

PRE-PROPOSAL CONFERENCE

RFP2000001684

An optional pre-proposal conference will be held at 10:00 a.m. on September 22, 2015, at the Lincolnia Senior Residences and Lincolnia Center Building, 4710 North Chambliss St., Alexandria, VA 22312, Dining Room. The purpose of this conference is to allow potential offerors an opportunity to present questions and obtain clarification relative to any facet of this solicitation.

While attendance at this conference will not be a prerequisite to submitting a proposal, offerors who intend to submit a proposal are encouraged to attend. Bring a copy of the solicitation with you. Any changes resulting from this conference will be issued in a written addendum to the solicitation.

All questions pertaining to this RFP should be submitted in writing to the contract specialist cynthia.joy@fairfaxcounty.gov and to dpsmteam2@fairfaxcounty.gov prior to the pre-proposal conference.



FAIRFAX COUNTY

DEPARTMENT OF PURCHASING & SUPPLY MANAGEMENT
12000 GOVERNMENT CENTER PARKWAY, SUITE 427
FAIRFAX, VIRGINIA 22035-0013

www.fairfaxcounty.gov/dpsm

VIRGINIA

TELEPHONE: (703) 324-3201 FAX: (703) 324-3228 TTY: 1-800-828-1140

ISSUE DATE: September 10, 2015	REQUEST FOR PROPOSAL NUMBER: RFP2000001684	TITLE: Management and Food Services for Lincolnia Senior Residences and Lincolnia Center Building
DEPARTMENT: Department of Housing and Community Development	DUE DATE/TIME: November 5, 2015 @ 10:00 a.m.	CONTRACT SPECIALIST : Cindy Joy, CPPB, cynthia.joy@fairfaxcounty.gov or 703-324-3276

Proposals - In accordance with the following and in compliance with all terms and conditions, unless otherwise noted, the undersigned offers and agrees, if the proposal is accepted, to furnish items or services for which prices are quoted, delivered or furnished to designated points within the time specified. It is understood and agreed that with respect to all terms and conditions accepted by Fairfax County the items or services offered and accompanying attachments shall constitute a contract.

Note: Fairfax County does not discriminate against faith-based organizations in accordance with the *Code of Virginia*, § 2.2-4343.1 or against a bidder or offeror because of race, religion, color, sex, national origin, age, disability, or any other basis prohibited by state law relating to discrimination in employment in the performance of its procurement activity.

NAME AND ADDRESS OF FIRM:

Telephone/Fax No.:

E-Mail Address:

Federal Employer Identification No or

Federal Social Security No.(Sole
Proprietor)

Prompt Payment Discount: ___% for payment within ___days/net
___days

State Corporation Commission (SCC)
Identification No.

By signing this proposal, Offeror certifies, acknowledges, understands, and agrees to be bound by the conditions set forth in the General Conditions and Instructions to Bidders as described in Appendix A, the Certification Regarding Ethics in Public Contracting set forth in Appendix B, and by any other relevant certifications set forth in Appendix B. .

BUSINESS CLASSIFICATION – Described in Appendix B - CHECK ONE: ☐ LARGE (Y) ☐ SMALL (B)

☐ MINORITY-OWNED SMALL (X) ☐ MINORITY OWNED LARGE (V) ☐ WOMEN-OWNED SMALL (C)

☐ WOMEN OWNED LARGE (A) ☐ NON PROFIT (9)

CHECK ONE: ☐ INDIVIDUAL ☐ PARTNERSHIP ☐ CORPORATION

Vendor Legally Authorized
Signature

Date

Print Name and Title

Sealed proposals subject to terms and conditions of this Request for Proposal will be received by the Fairfax County Purchasing Agent at 12000 Government Center Parkway, Suite 427, Fairfax, Virginia 22035-0013 until the date/time specified above.

AN EQUAL OPPORTUNITY PURCHASING ORGANIZATION



SPECIAL PROVISIONS

1. SCOPE OF SERVICES:

- 1.1. The purpose of this Request for Proposal is to solicit sealed proposals to establish a contract through competitive negotiation with a qualified management company of senior residential communities for property management services for the Lincolnian Senior Residences and Assisted Living.
- 1.2. The Property Management service is to include repair, maintenance and housekeeping services for the Lincolnia Senior Center building, grounds and food services for all Lincolnia program components in accordance with the terms and conditions of the Request for Proposal.
- 1.3 The successful offeror will maintain the appropriate licensing, which includes licensing for the operation of the Assisted Living portion of the facility. The licensee shall also ensure compliance with all regulations for licensed assisted living facilities and the terms of the license; with relevant federal, state and local laws and other relevant regulations, including food service and adult day health care; and with the facility's own policies and procedures.

2. PRE-PROPOSAL CONFERENCE:

- 2.1. An optional pre-proposal conference will be held on September 22, 2015 at 10:00 a.m., at the Lincolnia Senior Residences and Lincolnia Center Building, 4710 North Chambliss St. Alexandria, VA, 22312, Dining Room. To request reasonable ADA accommodations, call the Department of Purchasing and Supply Management ADA representative at (703) 324-3201 or TTY 1-800-828-1140. Please allow seven working days in advance of the event to make the necessary arrangements.
- 2.2. The purpose of the pre-proposal conference is to give potential offerors an opportunity to ask questions and to obtain clarification about any aspect of this Request for Proposal. Offerors may submit any questions pertaining to the RFP, in writing, prior to the pre-proposal conference to cynthia.joy@fairfaxcounty.gov

3. CONTRACT PERIOD AND RENEWAL:

- 3.1. This contract will begin on April 1, 2016, or date of award, whichever is later, and terminate on March 31, 2021. This contract may be renewed for an additional three (3) years, one-year at a time through March 31, 2024.
- 3.2. The obligation of the County to pay compensation due the contractor under the contract or any other payment obligations under any contract awarded pursuant to this Request for Proposal is subject to appropriations by the Fairfax County Board of Supervisors to satisfy payment of such obligations. The County's obligations to make payments during subsequent fiscal years are dependent upon the same action. If such an appropriation is not made for any fiscal year, the contract shall terminate effective at the end of the fiscal year for which funds were appropriated and the County will not be obligated to make any payments under the contract beyond the amount appropriated for payment obligations under the contract. The County will provide the contractor with written notice of non-appropriation of funds within thirty (30) calendar days after action is completed by the Board of Supervisors. However, the County's failure to provide such notice shall not extend the contract into a fiscal year in which sufficient funds have not been appropriated.

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4. INTRODUCTION AND BACKGROUND:

- 4.1. This is a re-bid of a current contract. The management fee can be viewed at our contract register www.fairfaxcounty.gov/cresister by entering contract number **4400001120** in the contract number box.
- 4.2. The 61,000 square foot Lincolnia Senior Center building is located at 4710 North Chambliss Street near the intersection of I-395 and Little River Turnpike in the Mason District of Fairfax County. There are two senior residential communities and two senior services programs in the building. The Lincolnian Senior Residences and Assisted Living includes a 52 bed licensed Assisted Living residence on one floor and 26 project based voucher studio apartment units on another floor. The two senior service programs include a licensed Adult Day Health Care Center (ADHC) operated by the Fairfax County Health Department (FCHD) and a Senior Multi- Purpose Recreational Center operated by the Fairfax County Department of Neighborhood and Community Services (NCS). In addition, a large commercial kitchen is located on site for the preparation of meals for all of the programs.
- 4.3. The combined Lincolnia Senior Center, licensed Adult Day Health Care Center, licensed Assisted Living and senior apartment residences offer in one location an innovative, multi-purpose service and residential center for older adults. In the building, services range from serving active older adults through its senior center and senior apartment residences to serving the needs of persons with health and functional impairments through its Adult Day Health Care Center and the licensed Assisted Living residences. The building provides older adults with the benefit of a continuum of care, coordinated services and programs, affordable assisted living with the availability of subsidized auxiliary grant beds and housing for low income older adults seldom offered in the private sector. A field with a track behind the building is used primarily by neighboring residents and community groups. The field is leased to the Fairfax Park Authority.
- 4.4. The Lincolnian has a residential, non-institutional character and atmosphere that supports aging in place. Funded by Fairfax County Government, this special facility has been in operation since January 1990. In April 2014 a \$13 million, multi-year renovation project of the entire building began. Renovations include the installation of anew HVAC system, a commercial generator which is capable of powering the entire building, new wall, floor and ceiling finishes, and new kitchenettes in residential units. The renovations are being completed in phases with some programs and housing continuing operations on site. The senior housing and adult day health care phases are expected to be completed in early summer 2015, followed by the senior center and kitchenettes being last. Substantial completion of all renovations are expected in early 2016. A description of the Renovation and Relocation Plans are included (Attachment A).
- 4.5. As the coordinating County agency for all services and programs in the Lincolnian building, the Fairfax County Department of Housing and Community Development (HCD) serves as contract administrator for property management of the residences, maintenance and custodial services of the entire building and grounds and food services for all programs in the building.
- 4.6. A cross systems team approach is used at the site between representatives of all programs in the building to identify and create greater efficiencies in service delivery, assist individuals to move along the continuum, organize the sharing of resources and in planning joint events and activities. Oversight of the cross systems teams is provided by HCD, Neighborhood and Community Services and the Fairfax County Health Department, who administer programs on site.

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4.7. LINCOLNIA CENTER PROGRAM COMPONENTS:

- A. Assisted Living (AL) and Quality Assurance (QA):** The Contractor is responsible for operating and managing the Lincolnian Assisted Living Residence. The assisted living residence consists of a 24 hour/7 day a week 52 bed licensed facility designed to serve the needs of low to moderate income Fairfax County residents. Meals, housekeeping, daily activities, health monitoring, wellness checks, custodial, maintenance and repair services. Collection of monthly assisted living fees charges, and as needed assistance with medication management, laundry services, and personal care assistance is included. Additionally, services of a Community Services Board (CSB) mental health therapist and psychiatrist, a Department of Family Services (DFS) social worker and NCS transportation for shopping needs are available on site to eligible residents. The assisted living residence serves individuals, who because of health impairments and/or supportive service needs cannot live independently, but do not require nursing facility care. Also individuals who are ambulatory or, that can transfer to and from bed, a wheelchair without assistance, can function in a group based setting and meet income criteria are eligible for the assisted living residence. Common areas include a first floor lounge, activity center, a residential dining room with a bistro, private dining room, beauty shop, community store, a wellness center, nurse's station, laundry room, a media center/library and a television lounge.

Applicants and residents are assessed, monitored and receive, as needed, services of members of a multi-disciplinary team consisting of the Contractor's Administrator/Director and Director of Nursing, an on-site social worker from the Fairfax County Department of Family Services (DFS) and on site mental health therapist with support from a visiting psychiatrist from the Fairfax-Falls Church Community Services Board (CSB). The waiting list of applicants is maintained by the DFS social worker.

The Health Department also provides a Long Term Care (LTC) Quality Assurance Coordinator who implements a County-wide quality assurance program for county owned long term care facilities with a health services component. In collaboration with the HCD's Associate Director of Senior Housing and Assisted Living and other agencies, the LTC Quality Assurance Coordinator facilitates regularly scheduled quality assurance (QA) meetings, develops and implements a monitoring system to promote quality care, and reviews, analyzes and monitors resident and staff files and reports to ensure compliance with federal, state and local licensing and program requirements.

- B. Senior Independent Living Residences:** The Contractor is responsible for providing property management services in the operation of the Lincolnian Senior Residences. This includes turning and leasing units; lease enforcement; collection of rent, security deposits, fees and other charges; repair and maintenance services; custodial services in common areas; unit inspections, resident communication tools (letters, meetings, notices, etc.), arranging optional dining services for evening meals, when requested; for planning and arranging transportation services for shopping trips through NCS and providing resident relations, social activities and related services. The Lincolnian Senior Residences consists of 26 studio apartment units all of which offer project based Housing Choice Voucher subsidies. The apartment units are equipped with kitchenettes with full size appliances, two closets, pantry, linen closet, balcony, full bathroom with a shower. Common areas include a media center, laundry room and two lounges on the third floor. Residents also have access to dinner meals in the resident dining room daily, participation in activities with assisted living residents, bi-monthly transportation for shopping, and access to free use of an outdoor gardening area. Individuals must be 62 years of age or older and meet income guidelines. There is a rich cultural and language diversity among residents. While the studio units are intended for individuals, couples are permitted. Preference is provided to Fairfax County residents and those of family members of county residents. The waiting list is established by the management company and is maintained by HCD's Rental Services Division which is responsible for eligibility determination and recertification of residents using project based vouchers.

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- C. **Adult Day Health Care (ADHC):** The Contractor is responsible for providing breakfast, lunch and snacks. Including custodial and maintenance services for the Lincolnia ADHC. The Fairfax County Health Department (FCHD) operates the licensed Lincolnia Adult Day Health Care Center for up to 40 frail, health impaired individuals who live in the community, usually with family caregivers, and cannot be left at home alone. Participants normally have a chronic or disabling illness that requires some assistance or supervision of activities of daily living (eating, walking, toileting, and dressing) and/or health monitoring and medication management. ADHC provides a structured, group-based daily program of therapeutic activities, breakfast, lunch and afternoon snacks, health monitoring, medication administration and personal care for participants and essential respite care to family caregivers. The ADHC operates in a secured space with its own multipurpose activity room, clinic, library, arts and crafts room, outdoor patio, small warming kitchen, outdoor courtyard and indoor sunroom. Transportation is available to eligible individuals.
- D. **Senior Recreation Center and After Hours Facility Use:** The Contractor is responsible for providing lunch meals, custodial and maintenance services for the Lincolnia Senior Center. The Lincolnia Senior Center provides a wide array of educational, recreational, social, wellness and fitness activities, trips and tours, computer and internet access, and nutritional congregate lunch meals on weekdays as a drop in center to individuals who live in the community, ages 55 and older. The program is administered by the Fairfax County Department of Neighborhood and Community Services (NCS). The programs include opportunities for active older adults in the community to participate, lead, learn, volunteer, socialize and stay connected in the community. The program also contracts with Easter Seals in the provision of Senior + services. Senior + provides supportive services and therapeutic activities for individuals attending the senior center with minor cognitive and physical disabilities.

The Senior Center is also available and used after hours (evenings and weekends) by local community groups, organizations for meetings, events and activities. NCS schedules, trains and monitors individuals from each group in the use of the senior center for after hour programming.

5. REFERENCE DOCUMENTS

The following reference documents may be viewed at the link(s) provided or the DPSM Website:

- A. **Standards for Licensed Assisted Living Facilities.**
http://www.dss.virginia.gov/files/division/licensing/alf/intro_page/code_regulations/regulations/final_alf_reg_071713.pdf
- B. **Standards and Regulations for Licensed Adult Day Health Care Centers.**
http://www.dss.virginia.gov/files/division/licensing/adcc/intro_page/code_regulations/regulations/final_adcc_reg_071713.pdf
- C. **Menu Planning Guidelines.**
<http://www.vda.virginia.gov/pdfdocs/MenuPlanningGuidelines2014Final.pdf>
- D. **Congregate Nutrition Services (Title III – C1).**
<http://www.vda.virginia.gov/pdfdocs/CM2014Final.pdf>
- E. **Guidelines for Sweets Served at the Congregate Nutrition.**
<http://www.vda.virginia.gov/pdfdocs/Sweets%20Guidelines.pdf>
- F. **Guidelines on Soliciting the Expertise of the Registered Dietitian.**
http://www.vda.virginia.gov/pdfdocs/expertiseofrd_2.docx
- G. **Senior Housing Admission and Continued Occupancy Policies and Procedures.** Fairfax County Department of Housing and Community Development, **DPSM Website.**
- H. **Lincolnia Renovation/Relocation Summary,** March 4, 2015, **DPSM Website.**
- I. **Meal Service at Lincolnia,** Fairfax County Department of Housing and Community Development, **DPSM Website.**
- J. **Breakfast and Snacks at the Adult Day Health Centers,** Fairfax County Department of Housing and Community Development. **DPSM Website.**

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6. TECHNICAL PROPOSAL INSTRUCTIONS:

- 6.1. The offeror must submit the Technical Proposal in a separate binder containing the following information. This information will be considered the minimum content of the proposal. Proposal contents shall be arranged in the same order and identified with headings as presented herein.
- 6.2. Name of firm submitting proposal; main office address; when organized; if a corporation, when and where incorporated; appropriate Federal, State, and County registration numbers.

6.3 PROPERTY MANAGEMENT

- a. **Independent Living Senior Residences** For property management of the 26 unit independent living Senior Residence all of which have Project-based Housing Choice Voucher subsidies. The offeror shall provide sample forms and a flow chart of their process. Eligibility determination, waiting list maintenance and re-assessments are conducted by HCD Rental Services staff. The offeror is responsible for showing units and screening potential applicants and transferring pre-application information to the HCD Rental Services staff, establishing and maintaining full occupancy of all studio units, conducting all unit maintenance, repairs and replacement(s) as necessary to make units ready for occupancy (turning units), obtaining an applicant pool from HCD, leasing units, lease enforcement, resident services, resident communications, collecting rent, fees and charges, management of tenant accounts receivables (TAR's) and conducting annual and interim unit inspections.
- b. **Communication Plan**- A draft plan outlining policies and procedures for ensuring proper communication between direct care and administrative staff working on all shifts, to ensure stable 24 hour/ 7 day a week assisted living and residential service operations and sound transitions shall be provided. The plan shall also include a proposed plan for the communication between other program staff in the building for maintenance, repair, housekeeping and other communication and coordination needs.
- c. **Staffing Plan**- Draft a staffing plan, including an organizational chart, staff position descriptions and schedule of positions to cover shifts for a 24 hour a day/7 day a week assisted living operation that includes required staffing for admission, administration, housekeeping services, laundry, and activity programming for the Assisted Living Residence and property management services for the Senior Independent Living Residence and coverage of custodial services, food services, maintenance and repair services for the entire building shall be provided. Also include policies and procedures for the selection, orientation and training of employees and indicate any position or activity that will be subcontracted.
 1. Include well defined policies and procedures for Human Resource Management of personnel who will be employees of the agent; to include information on benefits offered to employees.
 2. Draft an Emergency Preparedness and Response Plan to ensure the physical safety of residents, program participants, visitors and program staff throughout the building. The plan must address issues including but not limited to severe weather, fire, tornado, earth quakes, loss of utilities/problems with the emergency generator, flooding, work place violence or terrorism, severe injuries, hazardous environmental Events, after hours security and wanderers. The plan shall include procedures for conducting required emergency drills according to licensing, sheltering in place, property and record protection, communication devices and coordination with other programs in the building, supplies for emergencies, maintenance and access to roll call lists of residents. Additionally, plans shall include an infection control plan to prevent the development and transmission of disease or infection. These plans shall be in accordance with state licensing regulations. The Contractor shall be responsible for the coordination and maintenance of the Emergency Preparedness Plan, emergency communication systems used between programs in the building and for coordinating and documenting drills.

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- d. **Receptionist Coverage.** Create a plan for ensuring staff coverage at the residential reception desk between the hours of 8:30 am and 10:00 p.m. daily. The coverage shall also include staffing the centralized phone line, monitoring to ensure the safety of residents in the lounge and lobby and ensure that residents and guests are signing in and out of the residential entrance. The successful offeror shall ensure that the receptionist and after hours nursing staff are proficient in use of the centralized phone system, maintain a current directory of all employees in the building, have been oriented to other programs in the building and are familiar with emergency preparedness plans and location of documents, communication systems and how to secure the building.
- e. **Security-** Draft a plan for security of the building, including the use of security cameras, key management, after hours access systems, fire watches, supervision of sub-contractors and volunteers and other coverage needs, when required.
- f. **Property Management and Oversight-** The Contractor will establish and implement a management plan that is consistent with County/HCD property management and reporting procedures. The Contractor shall include a plan which incorporates preparing and submitting the following to the HCD Contract Administrator:
 - 1. Occupancy statistics for both housing components on a weekly basis.
 - 2. Reporting of contractor personnel changes; resident relations activities; marketing, administration, and maintenance and repair issues and actions and weekly service reports that provide work order details and status of such work orders.
 - 3. Maintenance of tenant records and personnel records consistent with County/HCD requirements as well as Virginia Department of Social Services Assisted Living licensing requirements.

6.4 **COMPLIANCE**

- a. **Fair Housing and Reasonable Accommodations** Offeror shall provided documentation or plans for training of staff on Fair Housing laws. Contractor is required to abide by Fair Housing laws and shall propose a process for responding to reasonable accommodation requests of residents with disabilities. Fair Housing training of staff, including subcontractors shall be documented in employee files.
- b. **Records and Documentation** Offeror shall include sample forms and policies for ensuring compliance with all federal, state and local requirements for recordkeeping, sharing of health and personally identified information and documentation, including the use of electronic health records. If electronic health records are to be used, also include a plan for software, hardware and information technology support. The Contractor is expected to coordinate and maintain up to date records of resident assessments, reassessments, individualized service plans, medication orders, psychosocial history and mental health history, services and other related licensing requirements.
- c. **Quality Assurance Initiatives** Offeror shall provide a draft plan to include the implementing quality assurance initiatives in conjunction with Fairfax County Health Department's Long Term Care Quality Assurance Coordinator. The Contractor will participate in regularly scheduled meetings with the Quality Assurance Coordinator and HCD's Associate Director of Senior Housing and Assisted Living. The ontractor will make resident, staff and medication records available for review and audit by the Quality Assurance Coordinator. The Contractor shall also include plans to encourage and support the formation and continuance of Resident Council meetings facilitated by residents.

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- d. **Quality Control and Implementation** Establish a formal process including the timeline for the start up and implementation of plans in the contract. Quality control procedures shall be included to monitor each facet of the final contract. The evaluation and quality control procedures must provide sufficient information to allow the County's administrators to monitor the Contractor's progress and effectiveness.
1. Identify and establish other quality control procedures to measure the success of its work in meeting County requirements in this contract. Measures to be tracked on an annual basis must be mutually agreed upon and reviewed with the County. Annual data shall be provided to HCD and the Quality Assurance Coordinator no later than June 15 of each contract year. The County's administrators will use the findings to evaluate the effectiveness and satisfaction of services on an annual basis.
 2. Develop procedures for immediate notification of any licensing inspection. This plan shall also include the submission of copies of licensing inspection reports, health department inspections and other related inspections to the Associate Director of Senior Housing and Assisted Living and the Long Term Care Quality Assurance Coordinator within 24 business hours of receipt of inspections.
 3. The Contractor will participate in regularly scheduled meetings with the Quality Assurance team, comprised of the Health Department and HCD. The team will develop Performance Measures and monitor progress towards accomplishing set goals. The team works cooperatively to review client and employee records, licensing findings and inspections, service and satisfaction data and works cooperatively to promote excellence and the attainment and maintenance of a two to three year license.
 4. The Contractor shall draft a plan and develop a flow chart and quality assurance tools that will identify how it will consistently organize work and records for ensuring proper documentation of all requirements for admission, assessment, reassessments, individualized service plans, client records, mental health records and documentation, medication management, annual physicals, medication updates, employment, background checks, staff orientation, training and development requirements and other standards indicated by HCD, licensing, and other regulatory bodies.
 5. Include in procedures that the Contractor shall consult with and seek input from the Associate Director of Senior Housing or designee prior to offering a job to a key position such as the Executive Director/Administrator, Director of Nursing and Director of Maintenance.
 6. Develop draft procedures for the creation and maintenance of employee records and files in accordance with licensing regulations and ensure completion of and documentation of required criminal background checks, Sworn Disclosure statements, staff orientation, TB testing, training include procedures for ensuring that required licenses are current.
 7. Include procedures that require all Contractor's personnel, while on County property, to wear a company photo ID badge as provided by the Contractor and display this badge on an easily visible location on their outer garment. The photo of the Contractor's employee must be updated at least every five years.
 8. Prepare a separate management agreement to address the provision of any other services not specifically addressed in the RFP which the successful offeror believes are essential to the effective operation of the Assisted Living and Senior housing residences and maintenance and food services of the Senior Center and Adult Day Health Care Center.

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9. Submission of corrective action plans in response to the Quality Assurance Coordinator's audit findings by deadlines indicated by the County.
10. Participation at Quarterly Contractor/HCD meetings to address and/or coordinate budgeting, management, capital projects and other issues of importance in the management of the Lincolnia Center contract.

6.5. ASSISTED LIVING

- a. Offeror shall assume general responsibility for the provision of nursing services, health monitoring, housekeeping, meals, laundry, custodial, repair and maintenance services, a monthly schedule of activities, administration of medication and supervision and/or assistance in carrying out the basic activities of daily living for residents, as appropriate. HCD expects the Contractor to attain and maintain at a minimum a two year license from the state licensing entity and ensure full compliance with licensing regulations. The Contractor shall be expected to meet all requirements of the Virginia Department of Social Services Standards for Licensed Assisted Living Facilities, The licensing regulations can be obtained at:
http://www.dss.virginia.gov/files/division/licensing/alf/intro_page/code_regulations/regulations/final_alf_reg_071713.pdf
- b. **Experience** Offeror shall provide documentation of experience in managing assisted living facilities and copies of the most recent year of licensing inspection reports;
- c. **Admissions** Offeror shall provide a draft of the process for admission of new residents. These policies which are subject to approval shall include procedures for the coordination of these duties with County staff for initial screening, assessment, individualized care plan development and implementation. The Contractor is a member of a four member Admissions/Discharge Team. Members are the Director and Director of Nursing of the Contractor, a Fairfax County Department of Family Services Social Worker and a Fairfax-Falls Church Community Services Board Mental Health Therapist. The team works collaboratively to maintain occupancy near 100% as possible considering the nature of the residents and licensing requirements. The Contractor has the final authority to reject any applicant, but must provide a valid reason with documentation for the denial of occupancy. The Contractor is ultimately responsible for ensuring that all required admission paperwork is completed in its entirety and that required documentation is obtained prior to resident admission. The plan shall include notification to HCD when there is not consensus by the admissions team concerning admissions, discharge or related issues.
- d. **Assessment and Care Coordination** Offeror shall provide a draft plan for on-going assessment, care planning, mental health assessment and coordination of service delivery among the Contractor's staff and other providers, as appropriate. The plan shall also include sample forms. Assisted Living residents shall be re-assessed and their care plans updated at a frequency of no less than annually and each time the resident's condition changes. Additionally, the plan must include procedures for hospitalization, reentry after hospitalization and/or rehabilitation or other prolonged absences.
- d. **Discharge Procedures** Offeror shall provide procedures when a resident is discharged, their care needs can no longer be met at the Lincolnian Assisted Living Residence. The Admissions Team meets to decide on discharges and coordinate discharge assistance. Provide draft guidelines and procedures for the discharge of Assisted Living residents including the provision of temporary care and assistance for residents awaiting transfer or discharge to another facility. The plan shall demonstrate sensitivity to the physical and emotional needs of residents facing discharge, and foster effective working relationships with the appropriate Fairfax County staff, family members and other service providers, as appropriate. The plan shall include procedures for emergency discharges, coordination of referrals and discharge planning.

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- f. **Nursing and Personal Care** Offeror shall provide a draft of their plan for the provision of nursing supervision and wellness and health monitoring for the Assisted Living residents with oversight by a full time registered nurse. This plan shall include a draft staffing plan for three shifts per day for 24 hour coverage, 7 days a week for 52 residents. This plan shall be prepared in accordance with licensing requirements and include written protocols of quality assurance for nursing care, ongoing training, supervision of staff, wellness checks and procedures for related record keeping and documentation.
 - g. **Medication Management** Offeror shall provide a draft plan for outlines policies and procedures for the effective management of medication, including doctor's orders, pharmacy coordination, and dispensation of medication, and documentation and review and storage of medication, including the protocols for training, supervision and monitoring of staff and records.
 - h. **Laundry Services** Offeror shall provide a written plan for the provision of laundry services for Assisted Living resident suites and personal laundry. An industrial washer and dryer are located in the basement and standard washers and dryers are located on the Assisted Living floor.
 - i. **Third Party Service Providers** Offeror shall provide a draft plan for proposed the Assisted Living Residence regarding procedures for physician referral, consulting physician services and on site visits, the arrangement of skilled nursing, restorative, habilitation and rehabilitation services including occupational, speech and physical therapy, mental health services and other specialized treatment services typically used or may be required for Assisted Living residents.
 - j. **Mental Health Emergencies** Offeror shall provide a draft plan to be developed for the effective management of medical, and/or mental health emergency situations, including policies and procedures in the use of physical restraints and do not resuscitate orders.
- 6.6. **PROGRAM SERVICES**
- a. **Resident Activities and Programming** The Offeror shall provide a draft plan to be submitted for how meaningful activities for all residents, with emphasis on assisted living residents, will be planned, organized and implemented. The activity/programming plan must exceed requirements of the Assisted Living licensing entity and include activities for weekdays, evenings and on weekends. The plan must take into consideration the varied interests, skills and abilities of residents, cultural and ethnic differences, language barriers, changes in cognitive status and/or functional abilities of residents and the coordination of joint activities with NCS and FCHD, where possible. Some residents may have mild cognitive impairments, while others may have a significant chronic mental health impairment or physical limitation that impairs function. Recommendations for activities and programs that meet the varied abilities and diverse interests shall be included. A sample written calendar of activities and programs for at least one month shall be also be provided.
 - b. **Transportation Assistance** The Offeror shall provide a proposal for the arrangement of transportation assistance to residents shall be included. The proposal shall include transportation for outings, shopping trips, etc. and the coordination of transportation assistance for individual AL resident appointments.

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6.7. FOOD SERVICES

Meal Service Components: The meal components of the various programs in the building are provided in the following ways:

1. **Adult Day Health Care Center (ADHC):** Breakfast, lunch and afternoon snacks are provided Monday through Friday for the ADHC participants and are prepared in the large commercial kitchen by the Contractor's food services staff. Each weekday morning ADHC staff makes a meal count request for the two meals and snacks for that day. Prior to meal service time ADHC staff pick up participant meals from the commercial kitchen and cart them back to their program location. The ADHC staff plate and serve meals and snacks to participants in the ADHC dining area of their multipurpose room. ADHC staff clean tables and return dirty dishes, utensils, beverage containers and serving containers after each meal to the kitchen for cleaning and sanitation.
2. **Senior Recreation Center:** Lunches are prepared in the large commercial kitchen Monday through Friday for the congregate meals program of the Senior Recreation Center, then plated in the kitchen by food services staff and served to program participants of the senior center in the senior center dining room along with beverages and dessert based on a meal count request made no later than the morning of meal services by Senior Center staff. Senior Center volunteers assist food services staff with setting up place settings on dining tables and in serving meals, beverages and desserts to seated senior center participants. After meals, food services staff remove dirty dishes, utensils, beverage containers and clean and sanitize them in the kitchen's commercial dishwasher, clean tables and remove trash.
3. **Assisted Living (AL) Residential Meals:** On a daily basis AL residents receive three meals (breakfast at 8:00 a.m.; lunch at noon; and dinner at 4:30 p.m.) that are prepared and plated in the commercial kitchen and are served by food services and care management staff of the offeror to residents who are seated at tables in the residential dining room. Daily meal counts are established based on census and resident availability for each meal by the offeror. Individual place settings and or table linen are set up by volunteers and/or food services staff prior to meal times. An afternoon (at 2:00 p.m.) and evening snack (around 7:30 p.m.) is also provided daily to AL residents. The food services staff will also supply snacks and/or beverages daily in the bistro area of the residential dining room. All table linens, plates, silverware, cups, mugs, serve ware, pots, pans and other kitchenware and equipment will be cleaned and sanitized after each use by the Contractor's food services staff in the commercial kitchen.
4. **Senior Independent Living Residents:** Residents of the third floor may sign up to receive dinner meals in the same manner as the AL residents on a daily basis in the residential dining room.
5. **Meal Program Staffing-** While the procedures outlined above are not the only acceptable method, propose a plan of meal program staffing based on this pattern. The staffing plan shall include a staffing chart, position descriptions and a schedule of staffing to cover a seven day a week meal service for assisted living and weekday meal services for the adult day health care and senior center.
6. **Meal Program Experience-** Include a statement of experience in commercial food preparation (for principal staff) and provide resumes for the chef and food services manager. Provide copies of most recent Food Services inspections of properties, licenses and other related information with the proposal. Include sample policies for food services.

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7. **Meal Counts and Reporting**- An estimate of the number of meals served in each setting is indicated in Attachment I- Description of Meal Service at the Lincolnia Facility. The county does not guarantee a maximum or minimum number of meals that will be ordered. Propose procedures for how the following will be managed as required by federal, state and local authorities:
 - a. A daily log of meal counts for breakfast, lunch, dinner and snacks will be maintained for each program with totals confirmed with each program site. The Contractor is responsible for maintaining a daily log of meals consumed by each assisted living (with separate counts for each Auxiliary Grant resident) and independent living resident. Documentation of wasted and guest meals shall be kept separately.
 - b. No later than the last day of the month meal count totals of meals consumed with separate reporting of breakfast, lunch, dinner and afternoon and evening snacks for Assisted Living residents and Senior independent residents shall be reported, as well as wasted and guest meals for all, to an assigned HCD manager to enter and submit data for required state and federal reports.
 - c. The Contractor is responsible for completing or obtaining for each resident at least annually or when there is a change in a resident's status, a completed Uniform Assessment Instrument and Nutrition Risk screening form and then submitting the information to the assigned HCD manager. The UAI can be found at <http://www.vda.virginia.gov/pdfdocs/uai.pdf> and the Nutrition Screening Checklist at http://www.vda.virginia.gov/pdfdocs/Nutritional_chklst_BW.pdf
 - d. Invoices for all meals consumed by residents and program participants of other programs shall be provided to a designated DFS Congregate Meals Program manager monthly, including back up documentation.
 - e. **Meal Donations**- The Contractor will collect donations for each meal eaten by independent living residents, guests and staff according to guidelines established by the Fairfax County Department of Family Services (DFS) Division of Adult and Aging Programs. All donations are to be sent to the DFS at least monthly or as required by DFS. A plan for how donations will be collected and accounted for, stored and sent to DFS shall be proposed.
 - f. **Compliance with Food Services Regulations and Standards**-
 1. All meals shall comply with the Virginia Division of Aging (VDA) Menu Planning Guidelines and VDA Service Standards for Congregate Nutrition Services Attachment D).
 2. Meals and snacks provided to the Adult Day Health Care Center shall comply with the Virginia Department of Social Services Relevant Food and Nutrition Standards and Regulations for Licensed Adult Day Care Centers; the VDA Services Standards for Congregate Nutrition Services; and Fairfax County Guidelines for Breakfast and Snacks at the Adult Day Health Care Centers.
 3. All meals provided to the Assisted Living Residences shall also comply with the Virginia Department of Social Services Standards for Licensed Assisted Living Facilities.

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- g. **Kitchen Maintenance and Supplies:** The commercial kitchen is fully established with all major appliances, china, glassware, eating utensils, cutlery, serving utensils, pots, pans, racks, baking dishes, bowls, and commercial grade small appliances including, but not limited to, coffee urns, toaster ovens, microwaves, and electric can openers. All major appliances in the Lincolnia commercial kitchen shall be maintained and repaired by Contractor and kept in good condition. The Contractor is also responsible for the tasks involved in the purchase of all replacement or additional kitchen supplies and equipment on behalf of the HCD. Provide plans for addressing the following:
1. Prepare a written comprehensive inventory in conjunction with HCD of all of the items in the kitchen that are the property of the FCRHA. This inventory shall be signed and dated by the Contractor and HCD within 30 days of a contract award. The Contractor will be responsible for the cost of replacement of all china, glassware, cutlery or cooking utensils that have been damaged or lost by the Contractor.
 2. When an appliance in the kitchen is in need of replacement or it is determined that additional kitchen supplies or equipment are needed, the Contractor shall obtain written approval from HCD prior to purchasing item(s). The Contractor shall submit a copy of the receipt for the purchase to the HCD. Prepare draft procedures for how kitchen inventory will be maintained and replacement/capital items will be identified and purchased.
 3. Prepare a plan that demonstrates how the entire commercial kitchen area will be maintained in a safe and sanitary manner and awareness and compliance with all applicable county, state and local codes for food preparation and food services, including establishing and maintaining applicable permits and licenses. The plan shall include a requirement to provide to the HCD a copy of all kitchen inspections, including not limited to, inspections conducted by the Fairfax County Health Department, the Fairfax County Fire Marshall or other authority within 24 hours of said inspection.
 4. Prepare a plan and timeline for how food services will be established, including obtaining a Permit to Operate a Food Establishment from the Fairfax County Health Department prior to beginning services.
- h. **Menu Planning and Meal Services:** The Contractor shall provide services seven days per week; Sunday through Saturday. The menu cycle for all meals must include at least two seasonal changes, one for summer and one for winter and must include breakfast, lunch, afternoon and evening snacks, and dinner. The menus should be appropriate for ethnically and culturally diverse populations and appeal to a wide variety of residents and participants. Lunches shall always include a choice of a hot lunch meal, a hot vegetarian lunch (meals absent of beef, pork, poultry, fish, etc) and a cold lunch option based on either a salad or fruit. Additionally, the contractor must be able to provide meals that are appropriate for seniors.
1. Additional guidelines include the following:
 - i. Organize special meal events (holidays) which focus on foods common to these holidays. These plans shall be made in collaboration with County staff.
 - ii. Provide a special birthday lunch, including a birthday cake once per month to celebrate participant birthdays during that month. These events shall be planned in collaboration with county staff.
 - iii. Provide low sodium, low fat, low sugar/no sugar added, and lactose-free diet options as needed that still meets the VDA menu guidelines.

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- iv. For desserts offered, use of fruits, whole grains or milk equivalents as dessert and foods low in fat and sugar are preferred. The contractor shall offer a sugar-free dessert option, upon prior request of a program participant.
 - v. Have readily available as requested, a listing of foods used in the menus containing potential allergens or food sensitivities, that includes menu items that have Monosodium Glutamate (MSG), milk, eggs, peanuts, tree nuts (such as almonds, cashews or walnuts), fish (such as bass, cod or flounder), shellfish (such as crab, lobster or shrimp), soy or wheat in them.
2. In response to the guidelines above, prepare the following:
- i. Prepare a sample menu for one month to include applicable breakfast, lunch, dinner, and snacks for afternoon and evenings that takes into account the ethnically and culturally diverse populations and that appeal to a wide variety of residents and program participants in the building.
 - ii. Prepare a procedure for ongoing resident and program-participant monitoring during meals as required by licensure, as well as a written plan and/or procedure for evaluating, intervening and documenting cases of nutritional and dietary concerns.
 - iii. Prepare a plan for the development of quality food standards whereby food is nutritious and flavorful, thus appetizing to residents and program participants alike and meet guidelines indicated in #7. This procedure must also include a process for obtaining resident satisfaction, surveys, feedback and input on menus.
 - iv. Include a plan for menu changes at least on a seasonal basis and the provision of written menus demonstrating these changes as indicated in #7 above. Menu changes must be submitted to and approved by a dietitian/nutritionist. Final review must include the Department of Family Services (DFS) no later than 45 days prior to implementation. Include within the plan a well defined role for a nutritionist/dietitian in responding to special dietary restrictions of residents and program participants as well as their well defined role as it relates to reviewing and approving menu plans that meet at least one-third of the minimum daily requirements. The nutritionist/dietitian shall also provide nutrition education on a quarterly basis to residents/participants and/or staff. Per licensing requirements, a dietitian or nutritionist shall provide quarterly on-site review of special diets, oversight of special diets of Assisted Living residents and written quarterly reports.
 - v. Include a plan to ensure the provision of attractive and aesthetically pleasing table settings and the replacement and routine care of table linen.

6.8. MAINTENANCE

1. **Maintenance and Repairs, Custodial and Housekeeping Services**- The Contractor will be responsible for all custodial, repair and maintenance services for the entire Lincolnia Center building, including the senior center, adult day health care center, common areas of the senior housing residences, all assisted living residential suites, the commercial kitchen, service hallways, basement and storage areas. Additionally, the offeror shall provide laundry services to Assisted Living residents. At a minimum, these services shall exceed the Commonwealth and County Health Department requirements for Assisted Living and Adult Day Health Care and other special residential facilities for older adults. The successful offeror shall ensure that the Lincolnia Center building is safe, clean, sanitary, well-maintained and responsive to the needs of both residents, program participants, staff and visitors.

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2. Provide a draft plan for custodial and housekeeping services for all Assisted Living residential areas, including residential suites and bathrooms, common areas, lounges, residential dining room, private dining room, community store, activity center, common area bathrooms, staff offices, nurse's station, hallways, storage areas, wellness center and library/media center and lobby area, commercial kitchen, lounge, and entrances. The plan shall also include all common areas; including lounges, hallways, laundry rooms, elevators, the basement offices, hallways, storage rooms, laundry room and stairwells and removal of trash. The senior independent living residents are responsible for cleaning the interior of their own units.
3. Provide a draft plan for custodial and housekeeping services for the Adult Day HealthCare Center, including all offices, multi-purpose room, the arts and crafts room, dining area, sunroom, nurse's clinic, bathrooms, kitchen, library and conference room.
4. Provide a draft plan for custodial and housekeeping services for the Senior Center, including all offices, Mason Hall, dining room, bathrooms, lounges, reception areas, arts and crafts room, billiard room, computer center, hallways, meeting rooms and storage areas. This service shall also include custodial services during evening and weekend usage cleaning needs.
5. Provide a draft plan for grounds maintenance, snow removal, landscaping, parking lot maintenance, loading dock access, maintenance of the generator, elevators, kitchen servicing, fire systems servicing, inspections and other related repairs and preventative maintenance needs. The plans shall also include grass cutting services for the field behind the building that is leased to the Park Authority.
6. Provide a draft plan for the provision of repair and maintenance services in all areas of the building (interior and exterior) and on the grounds. This shall include procedures for the handling of work orders and work requests made by residents and staff, as well as details on turnaround time for the expected completion of such requests. The plan must also include a draft communication plan for how requests will be received and responded to from residents, staff and other program staff in the building. The plan shall include methods of communication with other programs within the building during maintenance related or other emergencies. The plan must include a well defined list of what is deemed a maintenance or repair emergency and how coverage will be provided for emergency repairs and maintenance needs 24 hours a day, 7 days a week.

6.9. FINANCIAL MANAGEMENT

1. **Budgeting and Financial Reporting-** (All budgeting and financial reporting must reflect a distinction between Assisted Living, and Senior independent living Residences as it relates to all income and expenses). Other expenses for capital replacement, repair and other non-housing related expenses shall be reported with a distinction from housing programs. Provide procedures for addressing the following:

The annual budget shall coincide with the County's fiscal year, which is July 1 to June 30th. Proposed annual operating, dietary service and capital expense budgets for this property must be submitted to HCD for review and comment 90 days prior to the beginning of the new fiscal year (Jul 1), which is consistent with County's budgetary cycle and annual deadlines.

- a. The contractor will establish, implement and monitor a budgeting, accounting and reporting structure that is consistent with County/HCD requirements and conforms to Generally Accepted Accounting Principles (GAAP). The annual reporting cycle for this property is based on a July – June fiscal year. All financial transactions and postings must conform to financial industry best practices to include a full accrual accounting basis. Contractor will provide sample reports and an overview of the accounting and budgeting software package that will be used to manage the property's financial operations.

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- b. Monthly financial reports comparing current year budget to actual expenses including prior year (PYA) expenditures for comparison purposes; significant variances must be identified and documented; monthly Trial Balance Statement; monthly Balance Sheet report; detailed general ledgers; check registers; bank reconciliation worksheets; projected cash flow requirements; and, other financial statement backup information that would be required to fully review and interpret the financial reports.
 - c. Monthly supporting documentation that needs to be included with financial reports includes but may not be limited to: current tenant accounts receivable report; detailed tenant delinquencies report categorized by less than 30 days, 30-60 days, and, over 90 days; and, an explanation of contractors efforts at collection.
 - d. Submission of an annual financial and records audit conducted by an HCD approved audit firm within 120 days of fiscal year end.
 - e. Adherence to procurement procedures for subcontracting of services and vendors consistent with County/HCD requirements.
 - f. Contractor will hire a FCRHA approved independent auditing firm to perform an annual audit of property financial operations to ensure compliance with standard accounting and reporting practices. The annual audit shall be conducted upon the completion of each fiscal year. Final auditor opinion and financial statements will be made available for FCRHA review within 120 days of the fiscal year end on June 30.
 - g. HCD will review financial statements and auditor opinion to determine if financial controls and reporting processes are sufficient. If any financial control or process weaknesses or deficiencies are identified in the annual audit, HCD will require a detailed response from contractor that identifies the reasons for said deficiencies within 30 days after HCD's receipt of audit opinion. Contractor will have an additional 30 days to identify a plan to cure all financial control and/or process deficiencies. Appropriate HCD and Contractor staff will meet to ensure that proposed plan is sufficient to address deficiencies.
 - h. Should the audit opinion identify material weaknesses in any area of operations, HCD will require contractor to provide all items outlined in 7a plus a semi-annual internal audit will be conducted to determine if the identified deficiencies have been rectified. Appropriate HCD and Contractor staff will to plan, implement, conduct and oversee semi-annual audit.
 - i. If there are two consecutive years of material findings from the annual audit, HCD will require that the contractor provide a detailed plan outlining proposed changes to existing management plan. This could include staff changes, software upgrades, or significant process changes. Appropriate HCD staff will work closely with contractor to ensure that proposed plan is sufficient to address deficiencies.
2. **Contractor Requests for Payment and Submission of Monthly Invoices** Procedures shall be included that address the following:
- a. Contractor will submit invoices for payment of services provided no later than 30 days after the end of each month.
 - b. Invoices will include a detailed and itemized description of expenditures including supporting documentation that clearly describes services, supplies and/or materials rendered and/or delivered.
 - c. Contractor will respond promptly to inquiries for supporting documentation, back-up and expenditure justification. Invoices will be processed for payment only after all such supporting and back-up documentation has been provided by the Contractor..

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- d. Draft policies and procedures for the collection of rent, assisted living fees, security deposits, HUD Housing Assistance Payments (HAP), Auxiliary Grant funding, congregate meal services and other charges and sources of funding. Procedures shall include steps for ensuring proper accounting practices, security of funds, bank transactions and for proper accounting of security deposits, operating funds and reserve funds. Reserve funds shall be used for capital needs and replacement of furniture, equipment and appliances with approval from HCD. Payment of a Property Management/Asset Fee to HCD shall be included.
- 6.10. **Organizational and Staff Experience:** Offerors must describe their qualifications and experience to perform the work described in this Request for Proposal. Information about experience should include direct experience with the specific subject matter.
- 6.11. **References:** Special notation must be made of similar or related programs performed and must include organization names, addresses, names of contact persons, and telephone numbers for such reference.
- 6.12. **Personnel:** Full-time and part-time staff, proposed consultants and subcontractors who may be assigned direct work on this project should be identified. Information is required which will show the composition of the task or work group, its specific qualifications, and recent relevant experience. Special mention shall be made of direct technical supervisors and key technical personnel, and approximate percentage of the total time each will be available for this project. The technical areas, character and extent of participation by any subcontractor or consultant activity must be indicated and the anticipated sources will be identified.
 - a. Resumes of staff and proposed consultants are required indicating education, background, recent relevant experience with the subject matter of the project. Current telephone numbers must be included.
- 6.13. **Financial Statements:** The offeror shall provide an income statement and balance sheet from the most recent reporting period.
- 6.14. **Sample Documents:** The offeror shall provide an example of the following documents as part of its proposal. The documents provided should be based on similar property that is currently managed by the offeror.
 - a. Monthly invoice for payment of services
 - b. Typical invoice supporting documentation
 - c. Annual budget
 - d. Monthly property financial report comparing current year budget to actual expenses
 - e. Monthly balance
 - f. Monthly balance sheet
- 6.15. The personnel named in the technical proposal will remain assigned to the project throughout the period of this contract. No diversion or replacement may be made without submission of a resume of the proposed replacement with final approval being granted by the County Purchasing Agent.
- 7. **CONSULTATION SERVICES:**
 - 7.1 The contractor's staff must be available for consultation with County staff on an as-needed basis between 8:00 AM and 5:00 PM, Eastern Time, Monday through Friday.
- 8. **COST PROPOSAL INSTRUCTIONS:**
 - 8.1 The offeror must submit a cost proposal in a separate binder fully supported by cost and pricing data adequate to establish the reasonableness of the proposed Management fee(s).

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9. PRICING:

- 9.1. The subsequent contract will be a firm-fixed price agreement for the Management fee(s). The fee(s) will remain firm and will include all charges that may be incurred in fulfilling the requirements of the contract during the first 365 days. Changes in cost for any subsequent contract years may be based on the Consumer Price Index (CPI-U), Table 10, U.S. City Averages, or other relevant indices.
- 9.2. The request for a change in the unit price shall include as a minimum, (1) the cause for the adjustment; (2) proposed effective date; and, (3) the amount of the change requested with documentation to support the requested adjustment (i.e., appropriate Bureau of Labor Statistics, Consumer Price Index (CPI-U), change in manufacturer's price, etc.).
- 9.3. Price decreases shall be made in accordance with paragraph 43 of the General Conditions & Instructions to Offerors. (Appendix A)

10. TRADE SECRETS/PROPRIETARY INFORMATION:

- 10.1. Trade secrets or proprietary information submitted by an offeror in connection with a procurement transaction shall not be subject to public disclosure under the Virginia Freedom of Information Act; however, offerors must invoke the protections of this section prior to or upon submission of the data or other materials.
- 10.2. The offeror must identify the data or other materials to be protected and state the reasons why protection is necessary. Disposition of material after award(s) should be stated by the offeror.

11. CONTACT FOR CONTRACTUAL MATTERS:

- 11.1 All communications and requests for information and clarifications shall be directed to the following procurement official:

Cindy Joy, CPPB, Contract Specialist
 Department of Purchasing and Supply Management
 Telephone: (703) 324-3276
 Email: cynthia.joy@fairfaxcounty.gov
- 11.2. No attempt shall be made by any offeror to contact members of the Selection Advisory Committee (SAC) about this procurement (see paragraph 16.3).

12. REQUIRED SUBMITTALS:

- 12.1. Each Offeror responding to this Request for Proposal must supply all the documentation required in the RFP. Failure to provide documentation with the Offeror's response to the RFP will result in the disqualification of the Offeror's proposal.

13. SUBMISSION OF PROPOSAL:

- 13.1. **One (1) original hard copy (duly marked) and six (6) copies of the Technical proposal submitted on seven (7) separate CD's and one (1) original hard copy (duly marked) and six (6) copies of the Cost proposal submitted on seven (7) separate CD's.** shall be delivered to the following address in sealed envelopes or packages with the proposal number, title and the offerors name and address on the outside. The offeror must include a notarized statement that the CD or Flash Drive version is a true copy of the printed version. Electronically stamped delivery receipts are available.

Department of Purchasing and Supply Management
 12000 Government Center Parkway, Suite 427
 Fairfax, Virginia 22035-0013
 Telephone: 703-324-3201

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- 13.2. Offerors are reminded that changes to the request for proposal, in the form of addenda, are often issued between the issue date and within three (3) days before the due date of the solicitation. All addenda **MUST** be signed and submitted to the Department of Purchasing and Supply Management, 12000 Government Center Parkway, Suite 427, Fairfax, VA 22035 before the due date/time or must accompany the proposal. Notice of addenda will be posted on eVA and the DPSM current solicitation webpage. It is the Offeror's responsibility to monitor the web page for the most current addenda at www.fairfaxcounty.gov/dpsm/solic/htm.
- 13.3. It is the Offeror's responsibility to clearly identify and to describe the services being offered in response to the Request for Proposal. Offerors are cautioned that organization of their response, as well as thoroughness is critical to the County's evaluation process. The RFP forms must be completed legibly and in their entirety; and all required supplemental information must be furnished and presented in an organized, comprehensive and easy to follow manner.
- 13.4. Unnecessarily elaborate brochures of other presentations beyond that sufficient to present an complete and effective proposal is not desired. Elaborate artwork, expensive paper, bindings, visual and other presentation aids are not required. The County encourages the use of recycled paper, therefore it is urged that proposals be submitted on paper made from or with recycled content and be printed on both sides.
- 13.5. Each original and set of the six (6) copies of the proposal shall consist of:
- 13.6. Cover sheet (DPSM32)
- 13.7. Technical proposal as required in the Special Provisions, paragraph 6, **TECHNICAL PROPOSAL INSTRUCTIONS**.
- 13.8. Cost proposal as required in the Special Provisions paragraph 8, **COST PROPOSAL INSTRUCTIONS**. (Appendix B should be included in the Cost proposal).
- 13.9. By executing the cover sheet (DPSM32), Offeror acknowledges that they have read this Request for Proposal, understand it, and agree to be bound by its terms and conditions. Proposals may be submitted by mail or delivered in person.
14. **LATE PROPOSALS:**
 - 14.1. Proposals received in the Office of the County Purchasing Agent after the date and time prescribed shall not be considered for contract award and shall be returned to the offeror.
15. **PERIOD THAT PROPOSALS REMAIN VALID:**
 - 15.1. Proposals will remain valid for a period of one-hundred and eighty days (180) calendar days after the date specified for receipt of proposals.
16. **BASIS FOR AWARD:**
 - 16.1. This Request for Proposal is being utilized for competitive negotiation. Under the competitive negotiation process, a contract may be awarded to the responsible offeror whose proposal is determined to be the most advantageous to the County, taking into consideration price and the evaluation factors set forth in the Request for Proposal. The County reserves the right to make multiple awards as a result of this solicitation.
 - 16.2. A Selection Advisory Committee has been established to review and evaluate all proposals submitted in response to this Request for Proposal. The Committee shall conduct a preliminary evaluation of all proposals on the basis of the information provided with the proposal, and the evaluation criteria listed below. Based upon this review, the cost proposals of the highest rated offeror(s) will then be reviewed.

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- 16.3. No Offeror, including any of their representatives, subcontractors, affiliates and interested parties, shall contact any member of the Selection Advisory Committee or any person involved in the evaluation of the proposals. Selection Advisory Committee members will refer any and all calls related to this procurement to the procurement official named in 12.1 above. Failure to comply with this directive may, at the sole discretion of the County, result in the disqualification of an offeror from the procurement process.
- 16.4. Based on the results of the preliminary evaluation, the highest rated offeror(s) may be invited by the County Purchasing Agent to make oral presentations to the Selection Advisory Committee. This committee will then conduct a final evaluation of the proposals. Selection shall be made of two or more offerors deemed to be fully qualified and best suited among those submitting proposals, on the basis of the factors involved in the Request for Proposal, including price if so stated in the Request for Proposal. Negotiations shall then be conducted with each of the offerors so selected. After negotiations have been conducted with each offeror so selected, the County shall select the offeror which, in its opinion, has made the best proposal, and shall award the contract to that offeror.
- 16.5. Should the County determine in writing and in its sole discretion that only one offeror is fully qualified, or that one offeror is clearly more highly qualified than the others under consideration, a contract may be negotiated and awarded to that offeror. The Committee will make appropriate recommendations to the County Executive and Board of Supervisors, if appropriate, prior to actual award of contract.
- 16.6. **Proposal Evaluation Criteria**
The following factors will be considered in the award of this contract:
- | | |
|--------------------------------|-------------------|
| 1. PROPERTY MANAGEMENT | 20 POINTS |
| 2. COMPLIANCE | 35 POINTS |
| 3. ASSISTED LIVING | 40 POINTS |
| 4. PROGRAM SERVICES | 15 POINTS |
| 5. FOOD SERVICES | 25 POINTS |
| 6. MAINTENANCE | 15 POINTS |
| 7. FINANCIAL MANAGEMENT | 30 POINTS |
| 8. PRICE/PROPOSED FEES | 20 POINTS |
| TOTAL | 200 POINTS |
- 16.7. Fairfax County reserves the right to make on-site visitations to assess the capabilities of individual offerors and to contact references provided with the proposal.
- 16.8. The County Purchasing Agent may arrange for discussions with firms submitting proposals, if required, for the purpose of obtaining additional information or clarification.
- 16.9. Offerors are advised that, in the event of receipt of an adequate number of proposals, which, in the opinion of the County Purchasing Agent, require no clarifications and/or supplementary information, such proposals may be evaluated without further discussion. Consequently, offerors should provide complete, thorough proposals with the offerors most favorable terms. Should proposals require additional clarification and/or supplementary information, offerors should submit such additional material in a timely manner.
- 16.10. Proposals which, after discussion and submission of additional clarification and/or supplementary information, are determined to meet the specifications of this Request for Proposal will be classified as "acceptable". Proposals found not to be acceptable will be classified as "unacceptable" and no further discussion concerning same will be conducted.
- 16.11. The County may cancel this Request for Proposal or reject proposals at any time prior to an award, and is not required to furnish a statement of the reasons why a particular proposal was not deemed to be the most advantageous.

SPECIAL PROVISIONS**17. INSURANCE:**

- 17.1. The contractor is responsible for its work and for all materials, tools, equipment, appliances, and property of any and all description used in connection with the project, whether owned by the contractor or by the County. The contractor assumes all risks of direct and indirect damage or injury to any person or property wherever located, resulting from any action, omission, commission or operation under the contract, or in connection in any way whatsoever with the contracted work.
- 17.2. The Contractor shall, during the continuance of all work under the Contract provide the following:
- 17.3. Maintain statutory Worker's Compensation and Employer's Liability insurance in limits of not less than \$100,000 to protect the Contractor from any liability or damages for any injuries (including death and disability) to any and all of its employees, volunteers, or subcontractors, including any and all liability or damage which may arise by virtue of any statute or law in force within the Commonwealth of Virginia, or which may be hereinafter enacted.
- 17.4. The contractor agrees to maintain Commercial General Liability insurance in the amount of \$1,000,000 per occurrence/aggregate, to protect the contractor, its subcontractors, and the interest of the County, against any and all injuries to third parties, including bodily injury and personal injury, wherever located, resulting from any action or operation under the contract or in connection with contracted work
- 17.5. The contractor agrees to maintain owned, non-owned, and hired Automobile Liability insurance, in the amount of \$1,000,000 per occurrence/aggregate, including property damage, covering all owned, non-owned borrowed, leased, or rented vehicles operated by the Contractor. In addition, all mobile equipment used by the Contractor in connection with the contracted work will be insured under either a standard Automobile Liability policy, or a Comprehensive General Liability policy.
- 17.6. The contractor agrees to maintain Professional Liability insurance in the amount of \$1,000,000 per occurrence/aggregate to cover each individual professional staff.
- 17.7. Liability insurance may be arranged by General Liability and Automobile Liability policies for the full limits required, or by a combination of underlying Liability policies for lesser limits with the remaining limits provided by an Excess or Umbrella Liability policy.
- 17.8. Rating Requirements:
- 17.9. The Contractor agrees to provide insurance issued by companies admitted within the Commonwealth of Virginia, with the Best's Key Rating of at least A: VI.
- 17.10. European markets including those based in London, and the domestic surplus lines markets that operate on a non-admitted basis are exempt from this requirement provided that the contractor's broker can provide financial data to establish that a market is equal to or exceeds the financial strengths associated with the A.M. Best's rating of A:VI or better.
 - A. Indemnification: Article 63 of the General Conditions and Instructions to Bidders (Appendix A) shall apply.
 - B. The Contractor will provide an original, signed Certificate of Insurance citing the contract number and such endorsements as prescribed herein, and shall have it filed with the County Purchasing Agent and/or Risk Manager before any work is started.
 - C. The The Fairfax County Redevelopment and Housing Authority and the County of Fairfax, their employees and officers shall be named as an additional insured in the Automobile and General Liability policies and it shall be stated on the Insurance Certificate with the provision that this coverage is primary to all other coverage the County may possess.

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- D. If the Contractor delivers services from a County-leased facility, the Contractor is required to carry property insurance on all equipment, to include County-owned installed and maintained equipment used by the contractor while in their care, custody and control for use under this contract.
- E. No change, cancellation, or non-renewal shall be made in any insurance coverage without a 30 day written notice to the County Purchasing Agent and/or Risk Manager. The Contractor shall furnish a new certificate prior to any change or cancellation date. The failure of the Contractor to deliver a new and valid certificate will result in suspension of all payments until the new certificate is furnished.

17.11. Precaution shall be exercised at all times for the protection of persons (including employees) and property.

17.12 The County of Fairfax, its employees and officers shall be named as an additional insured in the Automobile and General Liability policies and it shall be stated on the Insurance Certificate with the provision that this coverage is primary to all other coverage the County may possess.

18. METHOD OF ORDERING:

- 18.1. The County may use two (2) different methods of placing orders from the final contract: Purchase Orders (PO's) and approved County procurement cards.
- 18.2. A Purchase Order (PO) may be issued to the contractor on behalf of the County agency ordering the items/services covered under this contract. An issued PO will become part of the resulting contract. The purchase order indicates that sufficient funds have been obligated as required by Title 15.2-1238 of the Code of the Commonwealth of Virginia.
- 18.3. Procurement Card orders and payments may also be made by the use of a Fairfax County or Fairfax County Public Schools "Procurement" Card. The Procurement Card is currently a Master Card. Contractors are encouraged to accept this method of receiving orders.
- 18.4. Regardless of the method of ordering used, solely the contract and any modification determine performance time and dates.
- 18.5. Performance under this contract is not to begin until receipt of the purchase order, Procurement Card order, or other notification to proceed by the County Purchasing Agent and/or County agency to proceed. Purchase requisitions shall not be used for placing orders.

19. REPORTS AND INVOICING:

- 19.1. The Contractor must maintain all records in compliance with federal and state regulations. The Contractor(s) must submit to each program administrator, monthly statistical reports and an annual tabulated report.
- 19.2. The Contractor must invoice each County department using the final contract separately. Invoices for all users of the contract must meet County requirements, unless otherwise indicated. The Contractor must send each department an itemized monthly invoice (or as agreed to between the parties), which must include the information listed below:
 - a. Employee name;
 - b. The name of the County Department;
 - c. Date of Services;
 - d. Type of Services and,
 - e. Itemized cost for each item/service.

SPECIAL PROVISIONS

- 19.8 County departments must receive monthly invoices by the 10th of each month following the month the Contractor provided the service. In addition, the Contractor will provide each County department a monthly and year-to-date utilization report which lists all information shown above in paragraph 19.2, a-e. The Contractor will mail the invoices and the utilization reports to the individuals identified in the final contract.

20. PAYMENTS:

- 20.1 The County will pay the Contractor based upon completion, acceptance, and approval by the County of each task outlined in the Special Provisions, paragraph **Error! Reference source not found.**, **TASKS TO BE PERFORMED.**

20. CHANGES:

- 20.1. Fairfax County may, at any time, by written order, require changes in the services to be performed by the Contractor. If such changes cause an increase or decrease in the Contractor's cost of, or time required for, performance of any services under this contract, an equitable adjustment shall be made and the contract shall be modified in writing accordingly. The County Purchasing Agent must approve all work that is beyond the scope of this Request for Proposal.
- 20.2. No services for which an additional cost or fee will be charged by the Contractor shall be furnished without the prior written authorization of the Fairfax County Purchasing Agent.

21. DELAYS AND SUSPENSIONS:

- 21.1. The County may direct the Contractor, in writing, to suspend, delay, or interrupt all or any part of the work of this contract for the period of time deemed appropriate for the convenience of the County. The County will extend the Contractor's time of completion by a period of time that in the discretion of the Purchasing Agent is reasonably suited for completion of work. The County may further amend the contract by mutual agreement for any increase in the cost of performance of the contract (excluding profit) resulting solely from the delay or suspension of the contract. No adjustment shall be made under this clause for any delay or interruption resulting from any other cause, including the fault or negligence of the Contractor.
- 21.2. If the County does not direct the Contractor, in writing, to suspend, delay, or interrupt the contract, the Contractor must give the County Purchasing Agent written notice if Fairfax County fails to provide data or services that are required for contract completion by the Contractor. The County may extend the Contractor's time of completion by a period of time that in the discretion of the Purchasing Agent is reasonably suited for completion of work. The County may further amend the contract by mutual agreement for any increase in the cost of performance of the contract (excluding profit) resulting solely from the delay or suspension of the contract. No adjustment shall be made under this clause for any delay or interruption resulting from any other cause, including the fault or negligence of the Contractor.
- 21.3. The Contractor shall continue its work on other phases of the project or contract, if in the sole discretion of the Purchasing Agent such work is not impacted by the County's delay, suspension, or interruption. All changes to the work plan or project milestones shall be reflected in writing as a contract amendment.

22. ACCESS TO AND INSPECTION OF WORK:

- 22.1. The Fairfax County Purchasing Agent and using agencies will, at all times, have access to the work being performed under this contract wherever it may be in progress or preparation.

SPECIAL PROVISIONS**23. PROJECT AUDITS:**

- 23.1. The Contractor shall maintain books, records and documents of all costs and data in support of the services provided. Fairfax County or its authorized representative shall have the right to audit the books, records and documents of the contractor under the following conditions:
- 23.2. If the contract is terminated for any reason in accordance with the provisions of these contract documents in order to arrive at equitable termination costs;
- 23.3. In the event of a disagreement between the contractor and the County on the amount due the Contractor under the terms of this contract;
- 23.4. To check or substantiate any amounts invoiced or paid which are required to reflect the costs of services, or the Contractor's efficiency or effectiveness under this contract; and,
- 23.5. If it becomes necessary to determine the County's rights and the contractor's obligations under the contract or to ascertain facts relative to any claim against the Contractor that may result in a charge against the County.
- 23.6. These provisions for an audit shall give Fairfax County unlimited access during normal working hours to the Contractor's books and records under the conditions stated above.
- 23.7. Unless otherwise provided by applicable statute, the contractor, from the effective date of final payment or termination hereunder, shall preserve and make available to Fairfax County for a period of three (3) years thereafter, at all reasonable times at the office of the Contractor but without direct charge to the County, all its books, records documents and other evidence bearing on the costs and expenses of the services relating to the work hereunder.
- 23.8. Fairfax County's right to audit and the preservation of records shall terminate at the end of three (3) years as stated herein. The Contractor shall include this "Right of Audit and Preservation of Records" clause in all subcontracts issued by it and they shall require same to be inserted by all lower tier subcontractors in their subcontracts, for any portion of the work.
- 23.9. Should the Contractor fail to include this clause in any such contract or lower tier contract, or otherwise fail to insure Fairfax County's rights hereunder, the Contractor shall be liable to Fairfax County for all reasonable costs, expenses and attorney's fees which Fairfax County may have to incur in order to obtain an audit or inspection of or the restoration of records which would have otherwise been available to Fairfax County from said persons under this clause. Such audit may be conducted by Fairfax County or its authorized representative.

24. DATA SOURCES:

- 24.1. The County will provide the Contractor all available data possessed by the County that relates to this contract. However, the Contractor is responsible for all costs for acquiring other data or processing, analyzing or evaluating County data.

25. SAFEGUARDS OF INFORMATION:

- 25.1. Unless approved in writing by the County Purchasing Agent, the Contractor may not sell or give to any individual or organization any information, reports, or other materials given to, prepared or assembled by the Contractor under the final contract.

26. ORDER OF PRECEDENCE:

- 26.1. In the event of conflict, the Acceptance Agreement (provided at contract award) and the Special Provisions of this contract shall take precedence over the General Conditions and Instructions to Bidders, (Appendix A).

SPECIAL PROVISIONS

27. SUBCONTRACTING:

- 27.1 If one or more subcontractors are required, the contractor is encouraged to utilize small, minority-owned, and women-owned business enterprises. For assistance in finding subcontractors, contact the Virginia Department of Business Assistance <http://www.dba.state.va.us>; the Virginia Department of Minority Business Enterprise <http://www.dmb.e.state.va.us/>; local chambers of commerce and other business organizations.
- 27.2. As part of the contract award, the prime contractor agrees to provide the names and addresses of each subcontractor, that subcontractor's status as defined by Fairfax County, as a small, minority-owned and/or woman-owned business, and the type and dollar value of the subcontracted goods/services provided. Reference Appendix B to this solicitation.

28. NEWS RELEASE BY VENDORS:

- 28.1. As a matter of policy, the County does not endorse the products or services of a contractor. News releases concerning any resultant contract from this solicitation will not be made by a contractor without the prior written approval of the County. All proposed news releases will be routed to the Purchasing Agent for review and approval.

29. AMERICANS WITH DISABILITIES ACT REQUIREMENTS:

- 29.1. Fairfax County Government is fully committed to the Americans with Disabilities Act (ADA) which guarantees non-discrimination and equal access for persons with disabilities in employment, public accommodations, transportation, and all County programs, activities and services. Fairfax County government contractors, subcontractors, vendors, and/or suppliers are subject to this ADA policy. All individuals having any County contractual agreement must make the same commitment. Your acceptance of this contract acknowledges your commitment and compliance with ADA.
- 29.2. Fairfax County is committed to a policy of nondiscrimination in all County programs, services, and activities and will provide reasonable accommodations upon request. Bidders requesting special accommodations should call the Department ADA representative at (703) 324-3201 or TTY 1-800-828-1140. Please allow seven (7) working days in advance of the event to make the necessary arrangements.

30. STATE CORPORATION COMMISSION IDENTIFICATION NUMBER:

- 30.1 Pursuant to *Code of Virginia*, §2.2-4311.2 subsection B, a bidder or offeror organized or authorized to transact business in the Commonwealth pursuant to Title 13.1 or Title 50 is required to include in its bid or proposal the identification number issued to it by the State Corporation Commission (SCC). Any bidder or offeror that is not required to be authorized to transact business in the Commonwealth as a foreign business entity under Title 13.1 or Title 50 or as otherwise required by law is required to include in its bid or proposal a statement describing why the bidder or offeror is not required to be so authorized. Any bidder or offeror that fails to provide the required information may not receive an award.

COUNTY OF FAIRFAX COMMONWEALTH OF VIRGINIA

GENERAL CONDITIONS AND INSTRUCTIONS TO BIDDERS

(Vendor: The general rules and conditions which follow apply to all purchases and become a definite part of each formal solicitation and resulting contract award issued by the DEPARTMENT OF PURCHASING & SUPPLY MANAGEMENT, unless otherwise specified. Bidders or their authorized representatives are expected to inform themselves fully as to the conditions, requirements, and specifications before submitting bids; failure to do so will be at the bidder's own risk and relief cannot be secured on the plea of error.)

Subject to all State and local laws, policies, resolutions, and regulations and all rules, regulations and limitations imposed by legislation of the Federal Government, bids on all solicitations issued by the DEPARTMENT OF PURCHASING & SUPPLY MANAGEMENT will bind bidders to applicable conditions and requirements herein set forth unless otherwise specified in the solicitation.

1. AUTHORITY -The Purchasing Agent has the sole responsibility and authority for negotiating, placing and when necessary modifying every solicitation, contract and purchase order (except for capital construction projects) issued by the County of Fairfax. In the discharge of these responsibilities, the Purchasing Agent may be assisted by assigned buyers. Unless specifically delegated by the County Purchasing Agent, no other County officer or employee is authorized to order supplies or services, enter into purchase negotiations or contracts, or in any way obligate the government of the County of Fairfax for an indebtedness. Any purchase ordered or contract made which is contrary to these provisions and authorities shall be of no effect and void and the County shall not be bound thereby.

2. DEFINITIONS-

AGENCY: Any Department, Agency, Authority, Commission, Board or other unit in the Administrative Service of the County.

BEST VALUE: As predetermined in the solicitation, means the overall combination of quality, price, and various elements of required services that in total are optimal relative to a public body's needs.

BID: The offer of a bidder to provide specific goods or services at specified prices and/or other conditions specified in the solicitation.

BIDDER/OFFEROR: Any individual, company, firm, corporation, partnership or other organization bidding on solicitations issued by the Purchasing Agent and offering to enter into contracts with the County. The term "bidder" will be used throughout this document and shall be construed to mean "offeror" where appropriate.

CONSULTANT SERVICES: Any type of services required by the County, but not furnished by its own employees, which is in its nature so unique that it should be obtained by negotiation on the basis of demonstrated competence and qualification for the type of service required and at fair and reasonable compensation, rather than by competitive sealed bidding.

CONTRACTOR: Any individual, company, firm, corporation, partnership or other organization to whom an award is made by the County.

COUNTY: County of Fairfax.

GOODS: All material, equipment, supplies, printing, and automated data processing/information technology hardware and software.

INFORMALITY: A minor defect or variation of a bid or proposal from the exact requirements of the invitation to bid or the request for proposal which does not affect the price, quality, quantity or delivery schedule for the goods, services or construction being procured.

INVITATION FOR BID (IFB): A request which is made to prospective suppliers (bidders) for their quotation on goods or services desired by the County. The issuance of an IFB will contain or incorporate by reference the specifications and contractual terms and conditions applicable to the procurement.

PROFESSIONAL SERVICES: Any type of professional service performed by an independent contractor within the practice of accounting, actuarial services, architecture, dentistry, land surveying, landscape architecture, law, medicine, optometry, pharmacy, or professional engineering (which shall be procured as set forth in the Code of Virginia §2.2-4301 in the definition of competitive negotiation at paragraph 3 (a), and in conformance with the Fairfax County Purchasing Resolution).

PURCHASING AGENT: The Purchasing Agent employed by the Board of Supervisors of Fairfax County, Virginia.

QUICK QUOTE (QQ): A method of competitive bidding for the purchase or lease of goods, non professional services or for the purchase of insurance, construction, or construction management when the estimated cost thereof shall be less the \$50,000.

REQUEST FOR PROPOSAL (RFP): A request for an offer from prospective offerors which will indicate the general terms which are sought to be procured from the offeror. The RFP will specify the evaluation factors to be used and will contain or incorporate by reference other contractual terms and conditions applicable to the procurement.

RESPONSIBLE BIDDER/OFFEROR: An individual, company, firm, corporation, partnership or other organization having the capability in all respects to perform fully the contract requirements, and also having the moral and business integrity and reliability which will assure good faith performance, and having been prequalified, if required. (Reference paragraph 24, General Conditions and Instructions to Bidders).

RESPONSIVE BIDDER/OFFEROR: An individual, company, firm, corporation, partnership or other organization having submitted a bid which conforms in all material respects to the invitation for bid or request for proposal.

General Conditions and Instructions to Bidders

SERVICES: Any work performed by an independent contractor wherein the service rendered does not consist primarily of acquisition of equipment or materials, or the rental of equipment, materials and supplies.

SOLICITATION: The process of notifying prospective bidders that the County wishes to receive bids on a set of requirements to provide goods or services. The notification of County requirements may consist of public advertising (newspaper, County Web Site, or other electronic notification), the mailing of Notices of Solicitation, Invitation for Bid (IFB) or Request for Proposal (RFP), the public posting of notices, issuance of an Open Market Procurement (OMP), or telephone calls to prospective bidders.

STATE: Commonwealth of Virginia.

CONDITIONS OF BIDDING

3. BID FORMS-Unless otherwise specified in the solicitation, all bids shall be submitted on the forms provided, to include the bid Cover Sheet and Pricing Schedule(s), properly signed in ink in the proper spaces and submitted in a sealed envelope or package. The item pages of the Pricing Schedule which do not include any items for which a bid is required need not be included in the submission of a bid.

Should the bid prices and/or any other submissions differ on the copy of the submitted bid, the ORIGINAL copy shall prevail.

4. LATE BIDS & MODIFICATIONS OF BIDS-

- a. Any bid/modification received at the office designated in the solicitation after the exact time specified for receipt of the bid/modification is considered a late bid/modification. A late bid/modification will not be considered for award except under the following conditions only:
 1. It was sent by registered or certified mail not later than the fifth (5th) calendar date prior to the date specified for receipt of the bid/modification; or
 2. The bid/modification was sent by mail and it is determined by the County Purchasing Agent that the late receipt was due solely to mishandling by the County after receipt at the address specified in the solicitation.
- b. If an emergency or unanticipated event or closing interrupts or suspends normal County business operations so that bids cannot be received at the County office designated for receipt of bids by the exact time specified in the solicitation, the due date/time specified for receipt of bids will be deemed to be extended to the same time of day specified in the solicitation on the first work day on which normal County business operations resume.
- c. The official time used for receipt of bids/modifications is the Bid Clerk's time and date stamp clock located in the Department of Purchasing and Supply Management. All bidders are responsible for ensuring all bids/modifications are received prior to the scheduled due date/time.
- d. A late hand-carried bid, or any other late bid not submitted by mail, shall not be considered for award.

5. WITHDRAWAL OF BIDS-

- a. A bidder for a public construction contract, other than a contract for construction or maintenance of public highways, may withdraw his or her bid from consideration if the price bid was substantially lower than the other bids due solely to a mistake therein, provided the bid was submitted in good faith, and the mistake was a clerical mistake as opposed to a judgment mistake, and was actually due to an unintentional arithmetic error or an unintentional omission of a quantity of work, labor or material made directly in the compilation of a bid, which unintentional arithmetic error or unintentional omission can be clearly shown by objective evidence drawn from inspection of original work papers, documents and materials used in the preparation of the bid sought to be withdrawn. If a bid contains both clerical and judgment mistakes, a bidder may withdraw his bid from consideration if the price bid would have been substantially lower than the other bids due solely to the clerical mistake, that was an unintentional arithmetic error or an unintentional omission of a quantity of work, labor or material made directly in the compilation of a bid which shall be clearly shown by objective evidence drawn from inspection of original work papers, documents and materials used in the preparation of the bid sought to be withdrawn. The bidder shall give notice in writing to the Purchasing Agent of his or her claim of right to withdraw his or her bid within two (2) business days after the conclusion of the bid opening procedure and shall submit original work papers with such notice.
- b. A bidder for a contract other than for public construction may request withdrawal of his or her bid under the following circumstances:
 1. Requests for withdrawal of bids prior to opening of such bids shall be transmitted to the County Purchasing Agent in writing.
 2. Requests for withdrawal of bids after opening of such bids but prior to award shall be transmitted to the County Purchasing Agent, in writing, accompanied by full documentation supporting the request. If the request is based on a claim of error, documentation must show the basis of the error. Such documentation may take the form of supplier quotations, vendor work sheets, etc. If bid bonds were tendered with the bid, the County may exercise its right of collection.
- c. No bid may be withdrawn under this paragraph when the result would be the awarding of the contract on another bid of the same bidder or of another bidder in which the ownership of the withdrawing bidder is more than five percent.
- d. If a bid is withdrawn under the authority of this paragraph, the lowest remaining bid shall be deemed to be the low bid.

General Conditions and Instructions to Bidders

- e. No bidder who is permitted to withdraw a bid shall, for compensation, supply any material or labor to or perform any subcontract or other work agreement for the person or firm to whom the contract is awarded or otherwise benefit, directly or indirectly, from the performance of the project for which the withdrawn bid was submitted.
- f. If the county denies the withdrawal of a bid under the provisions of this paragraph, it shall notify the bidder in writing stating the reasons for its decision and award the contract to such bidder at the bid price, provided such bidder is a responsible and responsive bidder.
- g. Work papers, documents, and materials submitted in support of a withdrawal of bids may be considered as trade secrets or proprietary information subject to the conditions of the Virginia Freedom of Information Act.

6. ERRORS IN BIDS-When an error is made in extending total prices, the unit bid price will govern. Erasures in bids must be initialed by the bidder. Carelessness in quoting prices, or in preparation of bid otherwise, will not relieve the bidder. Bidders are cautioned to recheck their bids for possible error. Errors discovered after public opening cannot be corrected and the bidder will be required to perform if his or her bid is accepted.

7. MAILING OF BIDS – All bids and proposals submitted in response to a Fairfax County solicitation shall be submitted in a sealed envelope or package identified with the solicitation number, title, bidder's name and address, and due date/time of opening/closing clearly marked on the outside of such envelope or package.

8. COMPLETENESS-To be responsive, a bid must include all information required by the solicitation.

9. ACCEPTANCE OF BIDS/BINDING 90 DAYS-Unless otherwise specified, all formal bids submitted shall be binding for ninety (90) calendar days following bid opening date, unless extended by mutual consent of all parties.

10. CONDITIONAL BIDS-Conditional bids are subject to rejection in whole or in part.

11. BIDS FOR ALL OR PART-Unless otherwise specified by the County Purchasing Agent or by the bidder, the Purchasing Agent reserves the right to make award on all items in the aggregate or on any of the items on an individual basis, whichever is in the best interest of the County. A bidder may restrict his or her bid to consideration in the aggregate by so stating but shall name a single unit price on each item bid. Any bid in which the bidder names a total price for all the articles without quoting a unit price for each and every separate item may not be considered for award.

12. AREA BIDS-For the purchase and delivery of certain goods and services the County may be divided into Areas (e.g., Areas I, II, III, and IV). When such goods and services are included in the Pricing Schedule, bidders may bid on all areas or an individual area. A map showing the areas of the County will be furnished with the solicitation when required.

13. TIME FOR RECEIVING BID-Bids received prior to the time of opening will be securely kept, unopened. The representative of the Purchasing Agent assigned to open them will decide when the specified time has arrived, and no bid received thereafter will be considered, except as provided in paragraph 4, General Conditions and Instructions to Bidders. No responsibility will attach to the Purchasing Agent or his or her representative for the premature opening of a bid not properly addressed and identified. Unless specifically authorized in the solicitation, telegraphic, electronic, or facsimile bids/modifications will not be considered.

14. BID OPENING-All bids received in response to an Invitation for Bid (IFB) will be opened at the date, time and place specified, read publicly, and made available for inspection as provided in paragraph 68, General Conditions and Instructions to Bidders. Tabulations of bids received are posted on the Department of Purchasing & Supply Management Bulletin Board as well as the County's web site: <http://www.fairfaxcounty.gov/dpsm/bidtab.htm>. Proposals received in response to a Request for Proposal (RFP) will be made available as provided in paragraph 68, General Conditions and Instructions to Bidders.

15. OMISSIONS & DISCREPANCIES-Any items or parts of any equipment listed in this solicitation which are not fully described or are omitted from such specification, and which are clearly necessary for the completion of such equipment and its appurtenances, shall be considered a part of such equipment although not directly specified or called for in the specifications.

Should a bidder find discrepancies or ambiguities in, or omissions from, the solicitation, including the drawings and/or specifications, he or she shall notify the Purchasing Agent at least five (5) days prior to the date set for the opening of bids. If necessary, the Purchasing Agent will send a written addendum for clarification to all bidders no later than three (3) days before the date set for opening of bids. Notifications regarding specifications will not be considered if received within five days of the date set for opening of bids.

16. RESPONSE TO SOLICITATIONS-In the event a vendor cannot submit a bid on a solicitation, he or she is requested to return the solicitation cover sheet with an explanation as to why he or she is unable to bid on these requirements.

17. BIDDER INTERESTED IN MORE THAN ONE BID-If more than one bid is offered by any one party, either directly or by or in the name of his or her clerk, partner, or other persons, all such bids may be rejected. A party who has quoted prices on work, materials, or supplies to a bidder is not thereby disqualified from quoting prices to other bidders or firms submitting a bid directly for the work, materials or supplies.

18. TAX EXEMPTION-The County is exempt from the payment of any federal excise or any Virginia sales tax. The price bid must be net, exclusive of taxes. However, when under established trade practice any federal excise tax is included in the list price, a bidder may quote the list price and shall show separately the amount of federal tax, either as a flat sum or as a percentage of the list price, which shall be deducted by the County. Fairfax County's Federal Excise Tax Exemption Number is 54-74-0127K. Contractors located outside the Commonwealth of Virginia are advised that when materials are picked up by the County at their place of business, they may charge and collect their own local/state sales tax. Materials used in the performance of construction contracts are subject to Virginia Sales/Use Tax as described in Section 630-10-27J of the Virginia Retail Sales and Use Tax Regulations.

General Conditions and Instructions to Bidders

19. PROHIBITION AGAINST UNIFORM PRICING-The County Purchasing Agent shall encourage open and competitive bidding by all possible means and shall endeavor to obtain the maximum degree of open competition on all purchase transactions using the competitive sealed bidding, competitive negotiation, or open market methods of procurement. In submitting a bid each bidder shall, by virtue of submitting a bid, guarantee that he or she has not been a party with other bidders to an agreement to bid a fixed or uniform price. Violation of this implied guarantee shall render void the bids of participating bidders. Any disclosure to or acquisition by a competitive bidder, in advance of the opening of the bids, of the terms or conditions of the bid submitted by another competitor may render the entire proceedings void and may require re-advertising for bids.

SPECIFICATIONS

20. QUESTIONS CONCERNING SPECIFICATIONS-Any information relative to interpretation of specifications and drawings shall be requested of the Purchasing Agent, in writing, in ample time before the opening of bids. No inquiries, if received by the Purchasing Agent within five (5) days of the date set for the opening of bids, will be given any consideration. Any material interpretation of a specification, as determined by the County Purchasing Agent, will be expressed in the form of an addendum to the specification which will be sent to all prospective bidders no later than three (3) days before the date set for receipt of bids. Oral answers will not be authoritative.

21. BRAND NAME OR EQUAL ITEMS-Unless otherwise provided in the invitation for bid, the name of a certain brand, make or manufacturer does not restrict bidders to the specific brand, make or manufacturer named; it conveys the general style, type, character, and quality of the article desired, and any article which the County in its sole discretion determines to be the equal of that specified, considering quality, workmanship, economy of operation, and suitability for the purpose intended, shall be accepted.

22. FORMAL SPECIFICATIONS-When a solicitation contains a specification which states no substitutes, no deviation therefrom will be permitted and the bidder will be required to furnish articles in conformity with that specification.

The bidder shall abide by and comply with the true intent of the specifications and not take advantage of any unintentional error or omission, but shall fully complete every part as the true intent and meaning of the specifications and drawings. Whenever the mention is made of any articles, material, or workmanship to be in accordance with laws, ordinances, building codes, underwriter's codes, A.S.T.M. regulations or similar expressions, the requirements of these laws, ordinances, etc., shall be construed as to the minimum requirements of these specifications.

23. FEDERAL SPECIFICATIONS-Any Federal Specifications referred to herein may be obtained from the GSA Federal Supply Service Bureau - Specification Section, 470 East L'Enfant Plaza, S.W., Suite #8100, Washington, D.C. 20407 (Voice: 1-202-619-8925, Fax: 1-202-619-8978).

AWARD

24. AWARD OR REJECTION OF BIDS-The Purchasing Agent shall award the contract to the lowest responsive and responsible bidder complying with all provisions of the IFB, provided the bid price is reasonable and it is in the best interest of the County to accept it. Awards made in response to a RFP will be made to the highest qualified offeror whose proposal is determined, in writing, to be the most advantageous to the County taking into consideration the evaluation factors set forth in the RFP. The Purchasing Agent reserves the right to award a contract by individual items, in the aggregate, or in combination thereof, or to reject any or all bids and to waive any informality in bids received whenever such rejection or waiver is in the best interest of the County. Award may be made to as many bidders as deemed necessary to fulfill the anticipated requirements of Fairfax County. The Purchasing Agent also reserves the right to reject the bid of a bidder deemed to be a non-responsible bidder.

In determining the responsibility of a bidder, the following criteria will be considered:

- a. The ability, capacity and skill of the bidder to perform the contract or provide the service required;
- b. Whether the bidder can perform the contract or provide the service promptly, or within the time specified, without delay or interference;
- c. The character, integrity, reputation, judgment, experience and efficiency of the bidder;
- d. The quality of performance of previous contracts or services;
- e. The previous and existing compliance by the bidder with laws and ordinances relating to the contract or services;
- f. The sufficiency of the financial resources and ability of the bidder to perform the contract or provide the service;
- g. The quality, availability and adaptability of the goods or services to the particular use required;
- h. The ability of the bidder to provide future maintenance and service for the use of the subject of the contract;
- i. The number and scope of the conditions attached to the bid;
- j. Whether the bidder is in arrears to the County on debt or contract or is a defaulter on surety to the County or whether the bidder's County taxes or assessments are delinquent; and
- k. Such other information as may be secured by the County Purchasing Agent having a bearing on the decision to award the contract. If an apparent low bidder is not awarded a contract for reasons of nonresponsibility, the County Purchasing Agent shall so notify that bidder and shall have recorded the reasons in the contract file.

25. NOTICE OF ACCEPTANCE/CONTRACT DOCUMENTS-A written award (or Acceptance Agreement) mailed (or otherwise furnished) to the successful bidder within the time for acceptance specified in the solicitation shall be deemed to result in a binding contract. The following documents which are included in the solicitation shall be incorporated by reference in the resulting contract and become a part of said contract:

- a. County of Fairfax Solicitation Form/Acceptance Agreement (Cover Sheet) and other documents which may be incorporated by reference, if applicable,
- b. General Conditions and Instructions to Bidders,
- c. Special Provisions and Specifications,
- d. Pricing Schedule,
- e. Any Addenda/Amendments/Memoranda of Negotiations

General Conditions and Instructions to Bidders

26. TIE-BIDS – If all bids are for the same total amount or unit price (including authorized discounts and delivery times), and if the public interest will not permit the delay of readvertisement for bids, the County Purchasing Agent is authorized to award the contract to the resident Fairfax County tie bidder whose firm has its principal place of business in the County, or if there be none, to the resident Virginia tie bidder, or if there be none, to one of the tie bidders by drawing lots in public; or the County Purchasing Agent may purchase the goods or services in the open market except that the price paid shall not exceed the lowest contract bid price submitted for the same goods or services. The decision of the County to make award to one or more such bidders shall be final.

27. PROMPT PAYMENT DISCOUNT-

- a. Unless otherwise specified in the solicitation, prompt payment discounts requiring payment in less than fifteen (15) days will not be considered in evaluating a bid for award. However, even though not considered in the evaluation, such discounts will be taken if payment is to be made within the discount period.
- b. In connection with any discount offered, time will be computed from the date of delivery of the supplies to the carrier when delivery, inspection and acceptance are at the point of origin; or, from date of delivery, inspection and acceptance at destination; or, from date correct invoice or voucher is received in the office specified by the County, if the latter is later than the date of acceptance. In the event the bidder does not indicate a prompt payment discount, it shall be construed to mean NET 30 days.

For the purpose of earning the discount, payment is deemed to be made as of the date of mailing of the County check or issuance of an Electronic Funds Transfer.

28. INSPECTION-ACCEPTANCE-For determining acceptance of supplies in accordance with the provisions of the prompt payment discount paragraph, inspection and acceptance shall be accomplished only after examination (including testing) of supplies and services to determine whether the supplies and services conform to the contract requirements. Acceptance shall occur only after receipt and inspection provided such inspection, as appropriate, is accomplished within a reasonable time.

29. DEFINITE BID QUANTITIES-Where definite quantities are specifically stated, acceptance will bind the County to order quantities specified and to pay for, at contract prices, all such supplies or services delivered that meet specifications and conditions of the contract. However, the County will not be required to accept delivery of any balances unordered, as of the contract expiration date, unless the Contractor furnished the Purchasing Agent with a statement of unordered balances not later than ten (10) days after the termination date of the contract.

30. REQUIREMENT BID QUANTITIES-On "Requirement" bids, acceptance will bind the County to pay for, at unit bid prices, only quantities ordered and delivered. Where the County specifies estimated quantities, the Contractor shall not be required to deliver more than ten (10) percent in excess of the estimated quantity of each item, unless otherwise agreed upon.

CONTRACT PROVISIONS

31. TERMINATION OF CONTRACTS-Contracts will remain in force for full periods specified and/or until all articles ordered before date of termination shall have been satisfactorily delivered and accepted and thereafter until all requirements and conditions shall have been met, unless:

- a. Terminated prior to expiration date by satisfactory deliveries of entire contract requirements, or upon termination by the County for Convenience or Cause.
- b. Extended upon written authorization of the Purchasing Agent and accepted by Contractor, to permit ordering of unordered balances or additional quantities at contract prices and in accordance with contract terms.

32. TERMINATION FOR CONVENIENCE-A contract may be terminated in whole or in part by the County in accordance with this clause whenever the County Purchasing Agent shall determine that such a termination is in the best interest of the County. Any such termination shall be effected by delivery to the Contractor at least five (5) working days prior to the termination date of a Notice of Termination specifying the extent to which performance shall be terminated and the date upon which termination becomes effective. An equitable adjustment in the contract price shall be made for completed service, but no amount shall be allowed for anticipated profit on unperformed services.

33. TERMINATION OF CONTRACT FOR CAUSE-

- a. If, through any cause, the Contractor shall fail to fulfill in a timely and proper manner his or her obligations under this contract, or if the Contractor violates any of the covenants, agreements, or stipulations of this contract, in addition to the County's remedies under the contract and all other rights available at law or in equity, the County shall have the right to immediately terminate this contract. Such termination shall be effected by delivering a notice of termination to the Contractor at any time specifying the effective date of such termination. In such event all finished or unfinished documents, data, studies, surveys, drawings, maps, models, and reports prepared by the Contractor under the contract shall, at the option of the County, become its property and the Contractor shall be entitled to receive just and equitable compensation for any satisfactory work completed on such documents.
- b. Notwithstanding the above, the Contractor shall not be relieved of liability to the County for damages sustained by the County by virtue of any breach of contract by the Contractor for the purpose of set off until such time as the exact amount of damages due to the County from the Contractor is determined.

34. CONTRACT ALTERATIONS-No alterations in the terms of a contract shall be valid or binding upon the County unless made in writing and signed by the Purchasing Agent or his or her authorized agent.

General Conditions and Instructions to Bidders

35. SUBLETTING OF CONTRACT OR ASSIGNMENT OF CONTRACT FUNDS-It is mutually understood and agreed that the Contractor shall not assign, transfer, convey, sublet or otherwise dispose of his or her contractual duties to any other person, firm or corporation, without the previous written consent of the Purchasing Agent. If the Contractor desires to assign his or her right to payment of the contract, Contractor shall notify the Purchasing Agent immediately, in writing, of such assignment of right to payment. In no case shall such assignment of contract relieve the Contractor from his or her obligations or change the terms of the contract.

36. FUNDING-A contract shall be deemed binding only to the extent of appropriations available to each Agency for the purchase of goods and services.

37. DELIVERY/SERVICE FAILURES-Failure of a Contractor to deliver goods or services within the time specified, or within reasonable time as interpreted by the Purchasing Agent, or failure to make replacements/corrections of rejected articles/services when so requested, immediately or as directed by the Purchasing Agent, shall constitute authority for the Purchasing Agent to purchase in the open market articles/services of comparable grade/quality to replace the services, articles rejected, and/or not delivered. On all such purchases, the Contractor shall reimburse the County, within a reasonable time specified by the Purchasing Agent, for any expense incurred in excess of contract prices. Such purchases shall be deducted from the contract quantities if applicable. Should public necessity demand it, the County reserves the right to use or consume articles delivered or services performed which are substandard in quality, subject to an adjustment in price to be determined by the Purchasing Agent.

38. NON-LIABILITY-The Contractor shall not be liable in damages for delay in shipment or failure to deliver when such delay or failure is the result of fire, flood, strike, the transportation carrier, act of God, act of Government, act of an alien enemy or by any other circumstances which, in the Purchasing Agent's opinion, are beyond the control of the Contractor. Under such circumstances, however, the Purchasing Agent may, at his or her discretion, cancel the contract.

39. NEW GOODS, FRESH STOCK-All Contractors, unless otherwise specifically stated, shall provide new commodities, fresh stock, latest model, design or pack.

40. NON-DISCRIMINATION-During the performance of this contract, the Contractor agrees as follows:

- a. The Contractor will not discriminate against any employee or applicant for employment because of race, religion, color, sex, national origin, age, disability, or other basis prohibited by state law relating to discrimination in employment, except where there is a bona fide occupational qualification reasonably necessary to the normal operation of the Contractor. The Contractor agrees to post in conspicuous places, available to employees and applicants for employment, notices setting forth the provisions of this non-discrimination clause.
- b. The Contractor, in all solicitations or advertisements for employees placed by or on behalf of the contractor, will state that such Contractor is an equal opportunity employer.
- c. Notices, advertisements and solicitations placed in accordance with federal law, rule or regulation shall be deemed sufficient for the purpose of meeting the requirements of this section.
- d. The Contractor will include the provisions of the foregoing paragraphs a, b, and c above in every subcontract or purchase order of over \$10,000 so that the provisions will be binding upon each subcontractor or vendor.
- e. Contractor and Subcontractor hereunder shall, throughout the term of this contract, comply with the Human Rights Ordinance, Chapter 11 of the Code of the County of Fairfax, Virginia, as reenacted or amended.

41. SMALL AND MINORITY BUSINESS UTILIZATION

- a. It is the policy of the County of Fairfax as declared by the Fairfax County Board of Supervisors' adoption of a Small and Minority Business Enterprise Program, April 6, 1981, that Fairfax County and its employees undertake every effort to increase opportunity for utilization of small or minority businesses in all aspects of procurement to the maximum extent feasible.
- b. Where it is practicable for any portion of the awarded contract to be subcontracted to other suppliers, the contractor is encouraged to offer such subcontracting opportunities to small, women and minority businesses.
- c. Where Federal grants or monies are involved it is the policy of Fairfax County, through its agents and employees, to comply with the requirements set forth in the U.S. Office of Management and Budget Circular No. A-102, uniform administrative requirements for Grants and Cooperative Agreements with State and Local Governments, as they pertain to small and minority business utilization.

42. GUARANTEES & WARRANTIES-All guarantees and warranties required shall be furnished by the Contractor and shall be delivered to the Purchasing Agent before final payment on the contract is made. Unless otherwise stated, manufacturer's standard warranty applies.

43. PRICE REDUCTION-If at any time after the date of the bid the Contractor makes a general price reduction in the comparable price of any material covered by the contract to customers generally, an equivalent price reduction based on similar quantities and/or considerations shall apply to this contract for the duration of the contract period (or until the price is further reduced). Such price reduction shall be effective at the same time and in the same manner as the reduction in the price to customers generally. For purpose of this provision, a "general price reduction" shall mean any horizontal reduction in the price of an article or service offered (1) to Contractor's customers generally, or (2) in the Contractor's price schedule for the class of customers, i.e., wholesalers, jobbers, retailers, etc., which was used as the basis for bidding on this solicitation. An occasional sale at a lower price, or sale of distressed merchandise at a lower price, would not be considered a "general price reduction" under this provision. The Contractor shall submit his or her invoice at such reduced prices indicating on the invoice that the reduction is pursuant to the "Price Reduction" provision of the contract documents. The Contractor in addition will within ten days of any general price reduction notify the Purchasing Agent of such reduction by letter. FAILURE TO DO SO MAY REQUIRE TERMINATION OF THE CONTRACT. Upon receipt of any such notice of a general price reduction, all ordering offices will be duly notified by the Purchasing Agent.

General Conditions and Instructions to Bidders

The Contractor, if requested, shall furnish, within ten days after the end of the contract period, a statement certifying either (1) that no general price reduction, as defined above, was made after the date of the bid, or (2) if any such general price reductions were made, that as provided above, they were reported to the Purchasing Agent within ten (10) days and ordering offices were billed at the reduced prices. Where one or more such general price reductions were made, the statement furnished by the Contractor shall include with respect to each price reduction (1) the date when notice of any such reduction was issued, (2) the effective date of the reduction, and (3) the date when the Purchasing Agent was notified of any such reduction.

44. CHANGES-Should it become proper or necessary in the execution of this contract to make any change in design, or to make any alterations which will increase the expense, the Purchasing Agent shall determine an equitable adjustment. No payment shall be made to the Contractor for any extra material or services, or of any greater amount of money than stipulated to be paid in the contract, unless some changes in or additions to the contract requiring additional outlay by the Contractor shall first have been expressly authorized and ordered in writing by contract amendment or otherwise furnished by the Purchasing Agent.

45. PLACING OF ORDERS-Orders against contracts will be placed with the Contractor on a Purchase Order (or Procurement Card) executed and released by the Purchasing Agent or his or her designee. The Purchase Order must bear the appropriate contract number and date. Where Blanket Purchase Agreements (BPAs) have been executed and a Blanket Purchase Order has been released by the Purchasing Agent, telephonic orders may be placed directly with the Contractor by authorized personnel in the ordering Agency.

DELIVERY PROVISIONS

46. SHIPPING INSTRUCTIONS - CONSIGNMENT-Unless otherwise specified in the solicitation each case, crate, barrel, package, etc., delivered under the contract must be plainly stenciled or securely tagged, stating the Contractor's name, purchase order number, and delivery address as indicated in the order. Where shipping containers are to be used, each container must be marked with the purchase order number, name of the Contractor, the name of the item, the item number, and the quantity contained therein. Deliveries must be made within the hours of 8:00 AM - 3:00 PM. Deliveries at any other time will not be accepted unless specific arrangements have been previously made with the receiver at the delivery point. No deliveries will be accepted on Saturdays, Sundays and holidays, unless previous arrangements have been made. It shall be the responsibility of the Contractor to insure compliance with these instructions for items that are drop-shipped.

47. RESPONSIBILITY FOR SUPPLIES TENDERED-Unless otherwise specified in the solicitation, the Contractor shall be responsible for the materials or supplies covered by the contract until they are delivered at the designated point, but the Contractor shall bear all risk on rejected materials or supplies after notice of rejection. Rejected materials or supplies must be removed by and at the expense of the Contractor promptly after notification of rejection, unless public health and safety require immediate destruction or other disposal of rejected delivery. If rejected materials are not removed by the Contractor within ten (10) days after date of notification, the County may return the rejected materials or supplies to the Contractor at his or her risk and expense or dispose of them as its own property.

48. INSPECTIONS-Inspection and acceptance of materials or supplies will be made after delivery at destinations herein specified unless otherwise stated. If inspection is made after delivery at destination herein specified, the County will bear the expense of inspection except for the value of samples used in case of rejection. Final inspection shall be conclusive except in regard to latent defects, fraud or such gross mistakes as to amount to fraud. Final inspection and acceptance or rejection of the materials or supplies will be made as promptly as practicable, but failure to inspect and accept or reject materials or supplies shall not impose liability on the County for such materials or supplies as are not in accordance with the specifications.

49. COMPLIANCE-Delivery must be made as ordered and in accordance with the solicitation or as directed by the Purchasing Agent when not in conflict with the bid. The decision of the Purchasing Agent as to reasonable compliance with delivery terms shall be final. Burden of proof of delay in receipt of goods by the purchaser shall rest with the Contractor. Any request for extension of time of delivery from that specified must be approved by the Purchasing Agent, such extension applying only to the particular item or shipment affected. Should the Contractor be delayed by the County, there shall be added to the time of completion a time equal to the period of such delay caused by the County. However, the contractor shall not be entitled to claim damages or extra compensation for such delay or suspension. These conditions may vary for construction contracts. See Special Provisions for the individual solicitation.

50. POINT OF DESTINATION-All materials shipped to the County must be shipped F.O.B. DESTINATION unless otherwise stated in the contract or purchase order. The materials must be delivered to the "Ship to" address indicated on the purchase order.

51. ADDITIONAL CHARGES-Unless bought F.O.B. "shipping point" and Contractor prepays transportation, no delivery charges shall be added to invoices except when express delivery is authorized and substituted on orders for the method specified in the contract. In such cases, difference between freight or mail and express charges may be added to invoice.

52. METHOD AND CONTAINERS-Unless otherwise specified, goods shall be delivered in commercial packages in standard commercial containers, so constructed as to ensure acceptance by common or other carrier for safe transportation to the point of delivery. Containers become the property of the County unless otherwise specified by bidder.

53. WEIGHT CHECKING-Deliveries shall be subject to re-weighing over official sealed scales designated by the County. Payments shall be made on the basis of net weight of materials delivered. Normal shrinkage may be allowed in such instances where shrinkage is possible. Net weights only, exclusive of containers or wrapping, shall be paid for by the County.

54. DEMURRAGE AND RE-SPOTTING-The County will be responsible for demurrage charges only when such charges accrue because of the County's negligence in unloading the materials. The County will pay railroad charges due to the re-spotting of cars, only when such re-spotting is ordered by the County.

55. REPLACEMENT-Materials or components that have been rejected by the Purchasing Agent, in accordance with the terms of a contract, shall be replaced by the Contractor at no cost to the County.

General Conditions and Instructions to Bidders

56. PACKING SLIPS OR DELIVERY TICKETS-All shipments shall be accompanied by Packing Slips or Delivery Tickets and shall contain the following information for each item delivered:

1. The Purchase Order Number,
2. The Name of the Article and Stock Number (Supplier's),
3. The Fairfax County Identification Number (FCIN), if specified in the order,
4. The Quantity Ordered,
5. The Quantity Shipped,
6. The Quantity Back Ordered,
7. The Name of the Contractor.

Contractors are cautioned that failure to comply with these conditions shall be considered sufficient reason for refusal to accept the goods.

BILLING

57. BILLING-Billing for the Fairfax County Public Schools and for County agencies: Unless otherwise specified on the contract or purchase order (PO), invoices are to be submitted, in DUPLICATE, for each purchase order immediately upon completion of the shipment or services. If shipment is made by freight or express, the original Bill of Lading, properly receipted, must be attached to the invoice. Invoices should be mailed to the "BILL TO" address on the PO or to the appropriate address specified in the contract.

PAYMENTS

58. PAYMENT-Payment shall be made after satisfactory performance of the contract, in accordance with all of the provisions thereof, and upon receipt of a properly completed invoice. Fairfax County reserves the right to withhold any or all payments or portions thereof for Contractor's failure to perform in accordance with the provision of the contract or any modifications thereto.

59. PARTIAL PAYMENTS-Unless otherwise specified, partial payments will be made upon acceptance of materials or services so invoiced if in accordance with completion date. However, up to 5 percent (5%) of the value of the entire order may be retained until completion of contract.

60. PAYMENT FOR EQUIPMENT, INSTALLATION, AND TESTING-When equipment requires installation (which shall also be interpreted to mean erection and/or setting up or placing in position, service, or use) and test, and where such installation or testing is delayed, payment may be made on the basis of 50% of the contract price when such equipment is delivered on the site. A further allowance of 25% may be made when the equipment is installed and ready for test. The balance shall be paid after the equipment is tested and found to be satisfactory. If the equipment must be tested, but installation is not required to be made by the Contractor or if the equipment must be installed but testing is not required, payment may be made on the basis of 75% at the time of delivery and the balance shall be paid after satisfactory test or installation is completed.

GENERAL

61. GENERAL GUARANTY-Contractor agrees to:

- a. Save the County, its agents and employees harmless from liability of any nature or kind for the use of any copyrighted or uncopyrighted composition; secret process, patented or unpatented; invention; article or appliance furnished or used in the performance of a contract for which the Contractor is not the patentee, assignee, licensee or owner.
- b. Protect the County against latent defective material or workmanship and to repair or replace any damages or marring occasioned in transit or delivery.
- c. Furnish adequate protection against damage to all work and to repair damages of any kind to the building or equipment, to his or her own work or to the work of other contractors, for which his or her workers are responsible.
- d. Pay for all permits, licenses and fees and give all notices and comply with all laws, ordinances, rules and regulations of the County.
- e. Protect the County from loss or damage to County owned property while it is in the custody of the Contractor.

62. SERVICE CONTRACT GUARANTY-Contractor agrees to:

- a. Furnish services described in the solicitation and resultant contract at the times and places and in the manner and subject to conditions therein set forth provided that the County may reduce the said services at any time.
- b. Enter upon the performance of services with all due diligence and dispatch, assiduously press to its complete performance, and exercise therein the highest degree of skill and competence.
- c. All work and services rendered in strict conformance to all laws, statutes, and ordinances and the applicable rules, regulations, methods and procedures of all government boards, bureaus, offices and other agents.
- d. Allow services to be inspected or reviewed by an employee of the County at any reasonable time and place selected by the County. Fairfax County shall be under no obligation to compensate Contractor for any services not rendered in strict conformity with the contract.
- e. Stipulate that the presence of a County Inspector shall not lessen the obligation of the Contractor for performance in accordance with the contract requirements, or be deemed a defense on the part of the Contractor for infraction thereof. The Inspector is not authorized to revoke, alter, enlarge, relax, or release any of the requirements of the contract documents. Any omission or failure on the part of the Inspector to disapprove or reject any work or material shall not be construed to be an acceptance of any such defective work or material. Notification of an omission or failure will be documented by the Purchasing Agent.

General Conditions and Instructions to Bidders

63. INDEMNIFICATION-Contractor shall indemnify, keep and save harmless the County, its agents, officials, employees and volunteers against claims of injuries, death, damage to property, theft, patent claims, suits, liabilities, judgments, cost and expenses which may otherwise accrue against the County in consequence of the granting of a contract or which may otherwise result therefrom, if it shall be determined that the act was caused through negligence or error, or omission of the Contractor or his or her employees, or that of the subcontractor or his or her employees, if any; and the Contractor shall, at his or her own expense, appear, defend and pay all charges of attorneys and all costs and other expenses arising therefrom or incurred in connection therewith; and if any judgment shall be rendered against the County in any such action, the Contractor shall, at his or her own expense, satisfy and discharge the same. Contractor expressly understands and agrees that any performance bond or insurance protection required by this contract, or otherwise provided by the Contractor, shall in no way limit the responsibility to indemnify, keep and save harmless and defend the County as herein provided.

64. OFFICIALS NOT TO BENEFIT-

- a. Each bidder or offeror shall certify, upon signing a bid or proposal, that to the best of his or her knowledge no Fairfax County official or employee having official responsibility for the procurement transaction, or member of his or her immediate family, has received or will receive any financial benefit of more than nominal or minimal value relating to the award of this contract. If such a benefit has been received or will be received, this fact shall be disclosed with the bid or proposal or as soon thereafter as it appears that such a benefit will be received. Failure to disclose the information prescribed above may result in suspension or debarment, or rescission of the contract made, or could affect payment pursuant to the terms of the contract.
- b. Whenever there is reason to believe that a financial benefit of the sort described in paragraph "a" has been or will be received in connection with a bid, proposal or contract, and that the contractor has failed to disclose such benefit or has inadequately disclosed it, the County Executive, as a prerequisite to payment pursuant to the contract, or at any other time, may require the Contractor to furnish, under oath, answers to any interrogatories related to such possible benefit.
- c. In the event the bidder or offeror has knowledge of benefits as outlined above, this information should be submitted with the bid or proposal. If the above does not apply at time of award of contract and becomes known after inception of a contract, the bidder or offeror shall address the disclosure of such facts to the Fairfax County Purchasing Agent, 12000 Government Center Parkway, Suite 427, Fairfax, Virginia 22035-0013. Relevant Invitation/Request for Proposal Number (see cover sheet) should be referenced in the disclosure.

65. LICENSE REQUIREMENT-All firms doing business in Fairfax County, shall obtain a license as required by Chapter 4, Article 7, of The Code of the County of Fairfax, Virginia, as amended, entitled "Business, Professional and Occupational Licensing (BPOL) Tax." Questions concerning the BPOL Tax should be directed to the Department of Tax Administration, telephone (703) 222-8234 or visit: http://www.fairfaxcounty.gov/dta/business_tax.htm. The BPOL Tax number must be indicated in the space provided on the Cover Sheet, "Fairfax License Tax No." when appropriate.

66. AUTHORIZATION TO CONDUCT BUSINESS IN THE COMMONWEALTH: A contractor organized as a stock or nonstock corporation, limited liability company, business trust, or limited partnership or registered as a registered limited liability partnership shall be authorized to transact business in the Commonwealth as a domestic or foreign business entity if so required by Title 13.1 or Title 50 of the *Code of Virginia* or as otherwise required by law. Any business entity described above that enters into a contract with a Fairfax County pursuant to the Fairfax County Purchasing Resolution shall not allow its existence to lapse or its certificate of authority or registration to transact business in the Commonwealth, if so required under Title 13.1 or Title 50, to be revoked or cancelled at any time during the term of the contract. Fairfax County may void any contract with a business entity if the business entity fails to remain in compliance with the provisions of this section.

67. COVENANT AGAINST CONTINGENT FEES-The Contractor warrants that no person or selling agency has been employed or retained to solicit or secure this contract upon an agreement or understanding for a commission, percentage, brokerage, or contingent fee, except bona fide employees or bona fide established commercial or selling agencies maintained by the Contractor for the purpose of securing business. For violation of this warranty, the County shall have the right to terminate or suspend this contract without liability to the County or in its discretion to deduct from the contract price or consideration, or otherwise recover, the full amount of such commission, percentage, brokerage, or contingent fee.

68. VIRGINIA FREEDOM OF INFORMATION ACT-All proceedings, records, contracts and other public records relating to procurement transactions shall be open to the inspection of any citizen, or any interested person, firm or corporation, in accordance with the Virginia Freedom of Information Act (Reference Section 4.D., of the Fairfax County Purchasing Resolution)

BIDDER/CONTRACTOR REMEDIES

69. INELIGIBILITY-

- a. Any person or firm suspended or debarred from participation in County procurement shall be notified in writing by the County Purchasing Agent.
 1. The Notice of Suspension shall state the reasons for the actions taken and such decision shall be final unless the person or firm appeals within thirty (30) days of receipt of the Notice by instituting legal action as provided in the Code of Virginia.
 2. The Notice of Debarment shall state the reasons for the actions taken and the decision shall be final unless the person or firm appeals within thirty (30) days of receipt of the notice by instituting legal action as provided in the Code of Virginia.
- b. The County Purchasing Agent shall have the authority to suspend or debar a person or firm from bidding on any contract for the causes stated below:
 1. Conviction for commission of a criminal offense as an incident to obtaining or attempting to obtain a public or private contract or subcontract, or in the performance of such contract or subcontract;
 2. Conviction under state or federal statutes of embezzlement, theft, forgery, bribery, falsification or destruction of records, receiving stolen property, or any other offense indicating a lack of business integrity or business honesty which currently, seriously, and directly affects responsibility as a County contractor;

General Conditions and Instructions to Bidders

3. Conviction under the state or federal antitrust statutes arising out of the submission of bids or proposals;
 4. Violation of contract provisions, as set forth below, of a character which is regarded by the County Purchasing Agent to be so serious as to justify suspension or debarment action:
 - (a) failure without good cause to perform in accordance with the specifications or within the time limit provided in the contract; or
 - (b) a recent record of failure to perform or of unsatisfactory performance in accordance with the terms of one or more contracts; provided, that failure to perform or unsatisfactory performance caused by acts beyond the control of the contractor shall not be considered to be a basis for suspension or debarment;
 5. Any other cause the County Purchasing Agent determines to be so serious and compelling as to affect responsibility as a contractor, such as debarment by another governmental entity for any cause listed herein, or because of prior reprimands;
 6. The contractor has abandoned performance or been terminated for default on any other Fairfax County project;
 7. The contractor is in default on any surety bond or written guarantee on which Fairfax County is an obligee.
- c. If, upon appeal, it is determined that the action taken by the County Purchasing Agent was arbitrary or capricious, or not in accordance with the Constitution of Virginia, statutes or regulations, the sole relief available to the person or firm shall be restoration of eligibility. The person or firm may not institute legal action until all statutory requirements have been met.

70. APPEAL OF DENIAL OF WITHDRAWAL OF BID-

- a. A decision denying withdrawal of a bid submitted by a bidder or offeror shall be final and conclusive unless the bidder appeals the decision within ten (10) days after receipt of the decision by instituting legal action as provided in the Code of Virginia. The bidder or offeror may not institute legal action until all statutory requirements have been met.
- b. If no bid bond was posted, a bidder refused withdrawal of bid under the provisions of Article 2, Section 4 a.9, of the Fairfax County Purchasing Resolution, prior to appealing, shall deliver to the County a certified check or cash bond in the amount of the difference between the bid sought to be withdrawn and the next low bid. Such security shall be released only upon a final determination that the bidder was entitled to withdraw the bid.
- c. If, upon appeal, it is determined that the decision refusing withdrawal of the bid was arbitrary or capricious, the sole relief shall be withdrawal of the bid.

71. APPEAL OF DETERMINATION OF NONRESPONSIBILITY-

- a. Any bidder who, despite being the apparent low bidder, is determined not to be a responsible bidder for a particular County contract shall be notified in writing by the County Purchasing Agent. Such notice shall state the basis for the determination, which shall be final unless the bidder appeals the decision within ten (10) days of receipt of the notice by instituting legal action as provided in the Code of Virginia. The bidder may not institute legal action until all statutory requirements have been met.
- b. If, upon appeal, it is determined that the decision of the County Purchasing Agent was arbitrary or capricious and the award for the particular County contract in question has not been made, the sole relief available to the bidder shall be a finding that the bidder is a responsible bidder for the County contract in question. Where the award has been made and performance has begun, the County may declare the contract void upon a finding that this action is in the best interest of the public. Where a contract is declared void, the performing contractor shall be compensated for the cost of performance up to the time of such declaration. In no event shall the performing contractor be entitled to lost profits.

72. PROTEST OF AWARD OR DECISION TO AWARD-

- a. Any bidder or offeror may protest the award or decision to award a contract by submitting a protest in writing to the County Purchasing Agent, or an official designated by the County of Fairfax, no later than ten (10) days after the award or the announcement of the decision to award, whichever occurs first. Any potential bidder or offeror on a contract negotiated on a sole source or emergency basis who desires to protest the award or decision to award such contract shall submit such protest in the same manner no later than ten days after posting or publication of the notice of such contract as provided in Article 3, Section 4, of the Fairfax County Purchasing Resolution. However, if the protest of any actual or potential bidder or offeror depends in whole or in part upon information contained in public records pertaining to the procurement transaction which are subject to inspection under Article 2, Section 4d of the Fairfax County Purchasing Resolution, then the time within which the protest must be submitted shall expire ten days after those records are available for inspection by such bidder or offeror under Article 2, Section 4d, or at such later time as provided herein. No protest shall lie for a claim that the selected bidder or offeror is not a responsible bidder or offeror. The written protest shall include the basis for the protest and the relief sought. The County Purchasing Agent shall issue a decision in writing within ten (10) days of the receipt of the protest stating the reasons for the action taken. This decision shall be final unless the bidder or offeror appeals within ten (10) days of receipt of the written decision by instituting legal action as provided in the Code of Virginia.
- b. If prior to award it is determined that the decision to award is arbitrary or capricious, then the sole relief shall be a finding to that effect. The County Purchasing Agent shall cancel the proposed award or revise it to comply with the law. If, after an award, it is determined that an award of a contract was arbitrary or capricious, then the sole relief shall be as hereinafter provided. Where the award has been made but performance has not begun, the performance of the contract may be declared void by the County. Where the award has been made and performance has begun, the County Purchasing Agent may declare the contract void upon a finding that this action is in the best interest of the County. Where a contract is declared void, the performing contractor shall be compensated for the cost of performance at the rate specified in the contract up to the time of such declaration. In no event shall the performing contractor be entitled to lost profits.
- c. Pending final determination of a protest or appeal, the validity of a contract awarded and accepted in good faith in accordance with this article shall not be affected by the fact that a protest or appeal has been filed.

General Conditions and Instructions to Bidders

- d. An award need not be delayed for the period allowed a bidder or offeror to protest, but in the event of a timely protest, no further action to award the contract will be taken unless there is a written determination that proceeding without delay is necessary to protect the public interest or unless the bid or offer would expire.

73. CONTRACTUAL DISPUTES-

- a. Any dispute concerning a question of fact as a result of a contract with the County which is not disposed of by agreement shall be decided by the County Purchasing Agent, who shall reduce his decision to writing and mail or otherwise forward a copy to the contractor within ninety (90) days. The decision of the County Purchasing Agent shall be final and conclusive unless the contractor appeals within six (6) months of the date of the final written decision by instituting legal action as provided in the Code of Virginia. A contractor may not institute legal action, prior to receipt of the County Purchasing Agent's decision on the claim, unless the County Purchasing Agent fails to render such decision within the time specified.
- b. Contractual claims, whether for money or other relief, shall be submitted in writing no later than sixty days after final payment; however, written notice of the contractor's intention to file such claim shall have been given at the time of the occurrence or beginning of the work upon which the claim is based. Nothing herein shall preclude a contract from requiring submission of an invoice for final payment within a certain time after completion and acceptance of the work or acceptance of the goods. Pendency of claims shall not delay payment of amounts agreed due in the final payment.

74. LEGAL ACTION-No bidder, offeror, potential bidder or offeror, or contractor shall institute any legal action until all statutory requirements have been met.

75. COOPERATIVE PURCHASING-The County may participate in, sponsor, conduct or administer a cooperative procurement agreement on behalf of or in conjunction with one or more other public bodies, or public agencies or institutions or localities of the several states, of the United States or its territories, or the District of Columbia, for the purpose of combining requirements to increase efficiency or reduce administrative expenses in any acquisition of goods and services. Except for contracts for professional services, a public body may purchase from another public body's contract even if it did not participate in the request for proposal (RFP) or invitation for bid (IFB), if the RFP or IFB specified that the procurement was being conducted on behalf of other public bodies. Nothing herein shall prohibit the assessment or payment by direct or indirect means of any administrative fee that will allow for participation in any such arrangement.

76. PROFESSIONAL AFFILIATION-The Department of Purchasing & Supply Management holds membership in the National Institute of Governmental Purchasing, Inc., a non-profit, educational and technical organization that includes among its goals and objectives the study, discussion, and recommendation of improvements in governmental purchasing and the interchange of ideas and experiences on local state, and national governmental purchasing problems.

77. DRUG FREE WORKPLACE-During the performance of a contract, the contractor agrees to (i) provide a drug-free workplace for the contractor's employees; (ii) post in conspicuous places, available to employees and applicants for employment, a statement notifying employees that the unlawful manufacture, sale, distribution, dispensation, possession, or use of a controlled substance or marijuana is prohibited in the contractor's workplace and specifying the actions that will be taken against employees for violations of such prohibition; (iii) state in all solicitations or advertisements for employees placed by or on behalf of the contractor that the contractor maintains a drug-free workplace; and (iv) include the provisions of the foregoing clauses in every subcontract of over \$10,000, so that the provisions will be binding upon each subcontractor or vendor. For the purposes of this section, "drug-free workplace" means a site for the performance of work done in conjunction with a specific contract awarded to a contractor in accordance with this section, the employees of whom are prohibited from engaging in the unlawful manufacture, sale, distribution, dispensation, possession or use of any controlled substance or marijuana during the performance of the contract.

78. VENUE: This contract and its terms, including, but not limited to, the parties' obligations under it, the performance due from each party under it, and the remedies available to each party for breach of it, shall be governed by, construed and interpreted in accordance with the laws of the Commonwealth of Virginia. Any jurisdiction's choice of law, conflict of laws, rules, or provisions, including those of the Commonwealth of Virginia that would cause the application of any laws other than those of the Commonwealth of Virginia shall not apply. Any and all disputes, claims and causes of action arising out of or in connection with this contract or any performance hereunder, shall be brought in the applicable court of Fairfax County, Virginia, or in the United States District Court, Eastern District of Virginia, Alexandria Division.

79. IMMIGRATION REFORM AND CONTROL ACT: Contractor agrees that it does not, and shall not during the performance of the contract for goods and services in the Commonwealth, knowingly employ an unauthorized alien as defined in the Federal Immigration Reform and Control Act of 1986.

80. CONTRACTOR NOT TO BENEFIT: Contractor agrees that the goods and/or services provided to Fairfax County pursuant to this Agreement are for the benefit of Fairfax County and that Contractor shall not undertake any actions or efforts stemming from or related to this Agreement that shall inure to the detriment of Fairfax County. Any information provided to the Contractor for the performance of this Contract shall not be used for any other purpose without the written consent of the Purchasing Agent.

APPROVED:

/S/ David P. Bobzien
COUNTY ATTORNEY

/S/ Cathy A. Muse
COUNTY PURCHASING AGENT

OFFEROR DATA SHEET

NAME OF OFFEROR: _____

ADDRESS: _____

E-MAIL ADDRESS: _____

Name and e-mail addresses of both service and fiscal representatives (Key Personnel) who would handle this account.

Service Representative: _____
Telephone Number: (____) _____
E-Mail Address: _____

Fiscal Representative: _____
Telephone Number: (____) _____
E-Mail Address: _____

Payment Address, if different from above:

VIRGINIA STATE CORPORATION COMMISSION (SCC)
REGISTRATION INFORMATION

The offeror:

☐ is a corporation or other business entity with the following SCC identification number:
_____ **-OR-**

☐ is not a corporation, limited liability company, limited partnership, registered limited liability partnership, or business trust **-OR-**

☐ is an out-of-state business entity that does not regularly and continuously maintain as part of its ordinary and customary business any employees, agents, offices, facilities, or inventories in Virginia (not counting any employees or agents in Virginia who merely solicit orders that require acceptance outside Virginia before they become contracts, and not counting any incidental presence of the bidder in Virginia that is needed in order to assemble, maintain, and repair goods in accordance with the contracts by which such goods were sold and shipped into Virginia from bidder's out-of-state location) **-OR-**

☐ is an out-of-state business entity that is including with this bid/proposal an opinion of legal counsel which accurately and completely discloses the undersigned bidder's current contacts with Virginia and describes why those contacts do not constitute the transaction of business in Virginia within the meaning of § 13.1-757 or other similar provisions in Titles 13.1 or 50 of the Code of Virginia.

Please check the following box if you have not checked any of the foregoing options but currently have pending before the SCC an application for authority to transact business in the Commonwealth of Virginia and wish to be considered for a waiver to allow you to submit the SCC identification number after the due date for bids: ☐

BUSINESS, PROFESSIONAL AND OCCUPATIONAL LICENSE

All firms located or operating in Fairfax County must obtain a Business, Professional and Occupational License (BPOL) as required by Chapter 4, Article 7, of the Code of the County of Fairfax, Virginia. In order for the Department of Tax Administration to determine your BPOL requirement prior to contract award, it is necessary for you to provide the following information:

- If you currently have a Fairfax County business license, please submit a copy with your proposal.
- Do you have an office in: Virginia ☐ Yes ☐ No
 Fairfax County ☐ Yes ☐ No
- Date business began/will begin work in Fairfax County

A detailed description of the business activity that will take place in Fairfax County. If business is located outside of Fairfax County, give the percentage of work actually to be done in the County

Signature

Date

Complete and return this form or a copy of your current Fairfax County Business License with your proposal.

CERTIFICATION REGARDING DEBARMENT OR SUSPENSION

In compliance with contracts and grants agreements applicable under the U.S. Federal Awards Program, the following certification is required by all offerors submitting a proposal in response to this Request for Proposal:

1. The Offeror certifies, to the best of its knowledge and belief, that neither the Offeror nor its Principals are suspended, debarred, proposed for debarment, or declared ineligible for the award of contracts from the United States federal government procurement or nonprocurement programs, or are listed in the *List of Parties Excluded from Federal Procurement and Nonprocurement Programs* issued by the General Services Administration.
2. "Principals," for the purposes of this certification, means officers, directors, owners, partners, and persons having primary management or supervisory responsibilities within a business entity (e.g., general manager, plant manager, head of a subsidiary, division, or business segment, and similar positions).
3. The Offeror shall provide immediate written notice to the Fairfax County Purchasing Agent if, at any time prior to award, the Offeror learns that this certification was erroneous when submitted or has become erroneous by reason of changed circumstances.
4. This certification is a material representation of fact upon which reliance will be placed when making the award. If it is later determined that the Offeror rendered an erroneous certification, in addition to other remedies available to Fairfax County government, the Fairfax County Purchasing Agent may terminate the contract resulting from this solicitation for default.

Printed Name of Representative: _____

Signature/Date: _____/_____

Company Name: _____

Address: _____

City/State/Zip: _____

SSN or TIN No: _____

Certification Regarding Ethics in Public Contracting

In submitting this bid or proposal, and signing below, Bidder/Offeror certifies the following in connection with a bid, proposal, or contract:

Check one:

☐

1. I have not given any payment, loan, subscription, advance, deposit of money, services or anything of more than nominal or minimal value to any public employee or official have official responsibility for a procurement transaction.

☐

2. I have given a payment, loan, subscription, advance, deposit of money, services or anything of more than nominal or minimal value to a public employee or official have official responsibility for a procurement transaction, but I received consideration in substantially equal or greater value in exchange.

If 2 is selected, please complete the following:

Recipient: _____

Date of Gift: _____

Description of the gift and its value:

Description of the consideration received in exchange and its value:

Printed Name of Bidder/Offeror Representative: _____

Signature/Date: _____ / _____

Company Name: _____

Company Address: _____

City/State/Zip: _____

This certification supplements but does not replace the requirements set forth in paragraph 64 (OFFICIALS NOT TO BENEFIT) of the General Conditions and Instructions to Bidders included in this solicitation

BUSINESS CLASSIFICATION

DEFINITIONS

Small Business – means a business, independently owned or operated by one or more individuals who are U.S. citizens or legal resident aliens, and together with affiliates, has 250 or fewer employees, or average annual gross receipts of \$10 million or less averaged over the previous three years. One or more of the individual owners shall control both the management and daily business operations of the small business.

Minority-Owned Business - means a business concern that is at least 51% owned by one or more minority individuals who are U.S. citizens or legal resident aliens, or in the case of a corporation, partnership, or limited liability company or other entity, at least 51% of the equity ownership interest in the corporation, partnership, or limited liability company or other entity is owned by one or more minority individuals who are U.S. citizens or legal resident aliens, and both the management and daily business operations are controlled by one or more minority individuals.

Woman-Owned Business – means a business that is at least 51% owned by one or more women who are U.S. citizens or legal resident aliens, or in the case of a corporation, partnership, or limited liability company or other entity, at least 51% of the equity ownership interest is owned by one or more women who are U.S. citizens or legal resident aliens, and both the management and daily business operations are controlled by one or more women.

YOU MUST CLASSIFY YOUR BUSINESS/ORGANIZATION BY MARKING THE APPROPRIATE BOXES ON THE COVER SHEET (DPSM32). This designation is required of all business/organizations including publicly traded corporations, non-profits, sheltered workshops, government organizations, partnerships, sole proprietorships, etc.



COUNTY OF FAIRFAX
DEPARTMENT OF PURCHASING & SUPPLY MANAGEMENT
SMALL AND MINORITY BUSINESS ENTERPRISE PROGRAM
12000 Government Center Parkway, Suite 427
Fairfax, Virginia 22035-0013

Fax: 703-324-3228

SUBCONTRACTOR (S) NOTIFICATION FORM

Contract Number/Title: _____

Prime Contractors Name: _____

Prime Contractor's Classification: _____

You are required to provide the County with names, addresses, anticipated dollar amount and small/minority classification of each first-tier subcontractor (ref. paragraph 0, Special Provisions). Please complete this form and return it with your submission.

Please check here if you are not using a subcontractor: _____

SUBCONTRACTOR(S) NAME	STREET ADDRESS	CITY	STATE	ZIP CODE	ANTICIPATED DOLLAR AMOUNT	VENDOR CLASSIFICATION

Complete and return this form with your proposal.